



MONTANA



*Montana Office of Tourism &
MercuryCSC Brand Awareness Study
Wave 4 – August 2010*



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Study Background

- In 2010, the Montana Office of Tourism and MercuryCSC continue to target Geotravelers* with advertising to increase their awareness of Montana and desire to travel to the state.
- Leisure Trends Group was contracted to conduct an ongoing, proprietary, quantitative brand and advertising awareness study. Four waves of this study have been completed.
- Wave 3 was conducted February 8-25, 2010 as a Pre measurement before the summer marketing launched in March to the three media markets (Chicago, Minneapolis, Seattle).
- Wave 4 was conducted May 17-June 15 at the peak of the summer campaign as a Post measurement.

Wave:	1	2	3	4
Timing:	February 2009	May 2009	February 2010	May 2010
Geotraveler Control Groups:	National	National	National	National
Geotraveler Media Markets:	Chicago	Chicago	Chicago	Chicago
Geotraveler Media Markets:	Atlanta	Atlanta	Minneapolis	Minneapolis
Geotraveler Media Markets:			Seattle	Seattle
General Population: National Control Group and Subsample in Media Markets				National, Chicago, Minneapolis & Seattle

Study Objectives

- Track Brand and Advertising Awareness, both Unaided and Aided, as well as consideration of travelling to Montana in the next 6-18 months and perceptions of what Montana offers travelers.
- Understand attributes related to the advertising and the Montana Tourism Brand, measuring shifts pre and post advertising in the 2010 media markets: Chicago, Minneapolis and Seattle.
- Employ a random national sample of Geotravelers as a control group to measure the impact of the 2010 Summer campaign.
- Add a general population sample to the Wave 4 survey to measure the impact of the campaign on the larger population.



Methodology

- Leisure Trends Group fielded an online study with 713 targeted consumers (Geotravelers*) utilizing our exclusive MAAP™ database.
 - 206 from Seattle
 - 170 from Chicago
 - 224 from Minneapolis
 - 113 from across the U.S. excluding Washington, Illinois, Minnesota and Montana
- A Dual Survey Methodology was used to ensure accurate targeting of Geotravelers
 - All respondents were segmented via a screening survey regarding their attitudes towards travel to best fit the target profile*. Those qualifying were selected to participate in Wave 3 or held in reserve for Wave 4.
- Leisure Trends Group included six questions from the Montana survey in the June LeisureTRAK** which was fielded to a random sample of 1,000 Americans balanced by age, gender and region. An additional 300 general population respondents were surveyed (100 from each media market) for comparison.

Analytic Notes

- Statistical Significance: Conclusions are made using a statistical exercise known as Significance Testing. Significance Testing determines whether the results are “statistically” different, or the results are merely a “numeric fluctuation” in the data. All of the results in this report are tested at the 95% confidence level – a stringent and typical standard. This means that if the study was conducted 100 times, we would expect to see the same conclusion 95 out of those 100 times.
- Base Sizes: The base size is noted for every chart in this report, as it varies based on how many respondents answered each question.

*Definition provided page 68

**Details provided page 54



Subgroup analysis is presented where relevant.* These subgroups are divided as follows:

- Seattle W3 & W4: Geotravelers who live in the Seattle, Washington metro area, by wave
- Chicago W1, W2, W3 & W4: Geotravelers who live in the Chicago, Illinois metro area, by wave
- Minneapolis W3 & W4: Geotravelers who live in the Minneapolis, Minnesota metro area, by wave
- National US W1, W2, W3 & W4: Geotravelers who do not live in Montana, Illinois, Atlanta, Washington or Minnesota, by wave

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- GPOP National: General population (not Geotravelers) from across the U.S.
 - GPOP Seattle: General population who reside in Seattle, Washington metro area
 - GPOP Chicago: General population who reside in Chicago, Illinois metro area
 - GPOP Minneapolis: General population who reside in Minneapolis, Minnesota metro area

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- Aware MT: Those who are aware of Montana as a travel destination, unaided or aided
 - Unaware MT: Those who are unaware of Montana as a travel destination, unaided or aided
 - Ad Aware: Those who are aware of Montana advertising, unaided or aided
 - Ad Unaware: Those who are unaware of Montana advertising, unaided or aided

*Complete Subgroup data is provided in the tabs.



Executive Summary



- Geotraveler unaided awareness of Montana as a travel destination significantly increases over 2009 (15% vs. 11%). *P14*
- Unaided awareness of Montana's advertising increases significantly over 2009 (16% vs. 3%). *P25*
 - Unaided advertising awareness increases significantly in all three media markets and remains flat in the national control group. *P24*
- Montana's aided awareness increases significantly for Geotravelers over 2009 (80% vs. 74%). *P16*
 - Aided awareness of Montana increases significantly for Geotravelers in Chicago and Minneapolis compared to Wave 3. *P15*
- Aided advertising awareness for Montana (29% vs. 8%), Yellowstone National Park (21% vs. 13%) and Glacier National Park (11% vs. 7%) increases significantly over 2009. Momentum gained between Wave 1 and Wave 2 is not lost in Wave 3. *P27*
 - Aided advertising awareness for Montana increases significantly in Wave 4 in all three media markets and remains flat in the national control group compared to Wave 3. *P26*
 - Geotravelers who are aware of Montana's advertising in Wave 4 are significantly more familiar with the state and both national parks than those unaware of the advertising. *P20*
 - Geotravelers in Wave 4 recall seeing scenic Montana advertising on trains, buses and billboards specifically. *P29, 34*
 - One in four Geotravelers recall seeing billboards and 12% recall hearing radio advertising for Montana in Wave 4; significant increases over Wave 3. *P34*
- Geotravelers likelihood to travel to Montana increases significantly over 2009 (23% vs. 13%). *P40*
 - In all waves, if Geotravelers are aware of Montana's advertising they are more likely to plan to travel to Montana. *P42*
 - Forty-two percent of Geotravelers cite advertising as a source of information for Montana in Wave 4, a significant increase compared to Wave 3. *P50*
- Across all waves, Geotravelers who are aware of Montana's advertising are significantly more likely to associate Montana with several of the key attributes including 'Spectacular, unspoiled nature' and 'Offers a sense of discovery' as well as both national parks than those unaware of the advertising. *P57*



Headlines: General Population

- Sixteen percent of the general population (not Geotravelers) are aware of advertising for Yellowstone National Park and 6% are aware of Montana's advertising on an aided basis. *P61*
- The general population living in all three media markets (Seattle, Chicago and Minneapolis) show significant increased advertising awareness over the national control group. *P61*
- One quarter of the general population have visited Yellowstone National Park and 19% have visited Montana as an adult. Ten percent have visited Glacier National Park. *P62*
- Seventeen percent of the general population is likely to travel to Montana in the next 18 months. Two in ten from Seattle and 27% from Minneapolis say they are likely to visit Montana in the next 18 months along with 12% from Chicago. *P63*
 - While results are directional due to the small base size, those in the general population who are aware of Montana's advertising are significantly more likely to plan to travel to Montana. *P63*
- Those in the general population who recall seeing Montana's advertising mention outdoor activities and beautiful scenery. *P67*
 - *"A magazine spread showing the wide open spaces in Montana, and describing it as a great getaway."*
 - *"The commercial seemed to advertise adventure destinations, such as hiking and canoeing."*
 - *"TV ad, Get Lost in Montana.com. They showed pictures of different places in Montana."*
- The key attributes focused on in the advertising lead the list of associations the general population has with Montana. *P68*
 - Those from Seattle and Minneapolis are significantly more likely to associate 'Spectacular, unspoiled nature' with Montana.
 - Those from Minneapolis are more likely to associate 'Breathtaking experiences' and 'Offers a sense of discovery' with Montana.
 - All three markets are more likely to associate Yellowstone National Park and Glacier National Park with Montana than the national control group.
- Those in the general population who have traveled to Montana as an adult cite never having been there before and the uncrowded nature of the destination as their top reasons for selecting Montana. *P69*
 - All inclusive trips and transportation discounts rank the lowest as reasons the general population selected Montana.



FINDINGS

- Year over year gains in awareness, ad awareness and likelihood to travel to Montana show that momentum is not lost between waves.
- General population in media markets are more likely to be aware of Montana advertising.

- Awareness of advertising increases intent to travel.
- Intent to travel is steadily increasing year over year.
- Awareness gained between Wave 1 and 2 is not lost in the off season. Wave 3 measures similar awareness levels to Wave 2.

- Advertising increases as a source of information for Montana but does not increase for travel destinations in general

CONCLUSIONS

- Repeated market specific focus builds a strong base of awareness and familiarity for Montana, Yellowstone National Park and Glacier National Park year over year.
- Media market focus is impacting the general population as well as Geotravelers.

- Establishing long term key markets is crucial to grow in Geotravelers consideration set as they make travel plans for the **next** year.
- This pattern is most likely true for the general population as well.
- While awareness is not lost in the off season, a stronger presence could impact travel plans being made prior to the start of spring campaigns.

- In spite of a strong competitive advertising season, the correlation between the campaigns and Geotraveler's gathering of information is stronger for Montana than other destinations.



Detailed Findings



Brand Awareness & Perceptions



Unaided awareness remains stable

Q: Thinking about all of the destinations within the United States, but outside your home state available for you to chose from for these non-business trips, please list all of the destinations that come to mind?

Unaided awareness remains stable in Wave 4 and is the seventh most mentioned destination.

- In Minneapolis, unaided awareness of Montana shifts directionally upward with 17% aware in Wave 4.

Unaided Awareness as a Travel Destination								
	Seattle W3 (A)	Seattle W4 (B)	Chicago W3 (C)	Chicago W4 (D)	Mnpls W3 (E)	Mnpls W4 (F)	National W3 (G)	National W4 (H)
CALIFORNIA NET	64%	68%	52%	52%	51%	51%	43%	37%
FLORIDA NET	29%	40% (A)	57%	50%	55%	50%	42%	35%
COLORADO NET	11%	12%	23%	19%	24%	29%	30%	31%
NEW YORK NET	25%	38%	33%	29%	33%	36%	23%	25%
UTAH NET	9%	8%	7%	5%	7%	9%	23%	19%
North Carolina	5%	2%	9%	8%	7%	6%	8%	19%
MONTANA NET	17%	18%	8%	5%	12%	17%	18%	17%
WASHINGTON NET	2%	1%	18%	15%	18%	21%	24%	16%
ARIZONA NET	27%	19%	27%	18%	24%	23%	19%	16%
Texas	9%	14%	16%	18%	22%	13%	17%	15%
OREGON NET	43%	44%	7%	5%	9%	12%	15%	15%
Washington DC	16%	15%	10%	14%	15%	16%	15%	13%
MASSACHUSETTS NET	8%	12%	17%	9%	13%	13%	14%	13%
Maine	4%	5%	6%	4%	8%	8%	13%	13%
WYOMING NET	4%	4%	1%	4%	4%	4%	14%	12%
ILLINOIS NET	9%	10%	2%	2%	27%	28%	14%	12%
VIRGINIA NET	5%	1%	3%	4%	4%	5%	9%	12%
Hawaii	39%	39%	19%	21%	16%	21%	8%	11%
New Hampshire	1%	2%	0%	1%	1%	0%	7%	11%
GEORGIA NET	6%	5%	9%	8%	8%	3%	10%	10%
Alaska	13%	13%	6%	8%	7%	10%	9%	10%
NEVADA NET	33%	25%	31%	23%	27%	23%	19% (H)	9%
South Carolina	4%	6%	7%	9%	7%	7%	9%	9%
Yellowstone National Park	7%	7%	5%	3%	6%	6%	11%	7%
Grand Teton National Park	1%	0%	0%	1%	0%	-	1%	3%
Glacier National Park	3%	4%	1%	2%	2%	2%	4%	2%
Rocky Mountain National Park	1%	-	-	-	1%	0%	3%	1%

Upper-case letters indicate the number is statistically higher than the value in the column referenced by the letter.

*NET includes mentions of specific cities or parks/attractions within that state. Yellowstone NP included in MT NET, and not included in WY NET.
Destinations with lower than 9% awareness for the National population not shown, with the exception of the parks.

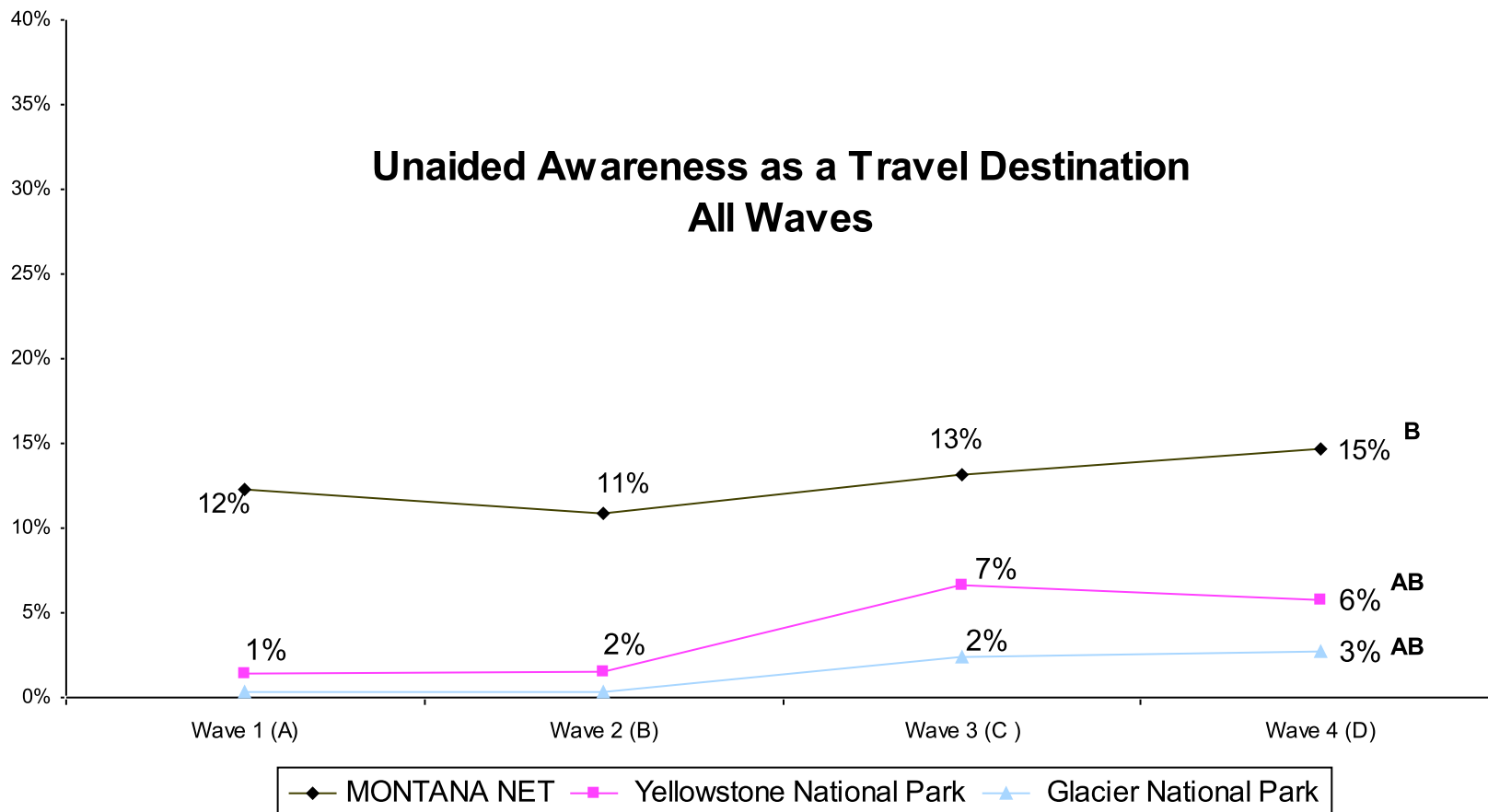
Base = 1,596 Geotravelers



Unaided awareness rises across all waves

Q: Thinking about all of the destinations within the United States, but outside your home state available for you to chose from for these non-business trips, please list all of the destinations that come to mind?

Unaided awareness rises slightly wave over wave, with significant increases over Wave 2 for Montana and both National Parks.



Upper-case letters indicate the number is statistically higher than the value in the column referenced by the letter.

Base = 2,887 Geotravelers





Montana awareness increases in Chicago & Minneapolis

Q: Are you aware of the following locations as travel destinations?

Aided awareness of Montana significantly increases in both media markets, Chicago and Minneapolis, in Wave 4. Awareness of Glacier National Park also significantly increases in Minneapolis over Wave 3.

Aided Awareness as a Travel Destination

	Seattle W3 (A)	Seattle W4 (B)	Chicago W3 (C)	Chicago W4 (D)	Mnpls W3 (E)	Mnpls W4 (F)	National W3 (G)	National W4 (H)
Yellowstone National Park	96%	95%	92%	91%	93%	96%	97%	95%
Alaska	95%	93%	88%	86%	90%	96% (E)	94%	95%
Colorado	85%	81%	86%	88%	91%	92%	93%	93%
California	97%	98%	93%	91%	91%	96% (E)	91%	91%
Glacier National Park	86%	83%	80%	79%	83%	90% (E)	90%	89%
Grand Teton National Park	84%	76%	69%	71%	74%	83% (E)	87%	83%
Rocky Mountain National Park	68%	65%	80%	74%	69%	78% (E)	81%	83%
Utah	80%	74%	69%	67%	69%	75%	81%	85%
Montana	85%	79%	65%	74% (C)	74%	86% (E)	81%	77%
Washington	91%	86%	73%	70%	70%	76%	80%	76%
Vermont	70%	65%	67%	64%	64%	67%	78%	75%
Oregon	90%	92%	65%	63%	66%	72%	78%	73%
Maine	68%	69%	71%	72%	70%	71%	76%	78%
Wyoming	73%	68%	68%	73%	71%	82% (E)	75%	73%
Idaho	76%	75%	52%	54%	55%	63%	59%	63%
Michigan	52%	50%	88%	86%	66%	75% (E)	54%	60%

Base = 1,604 Geotravelers

Upper-case letters indicate the number is statistically higher than the value in the column referenced by the letter.

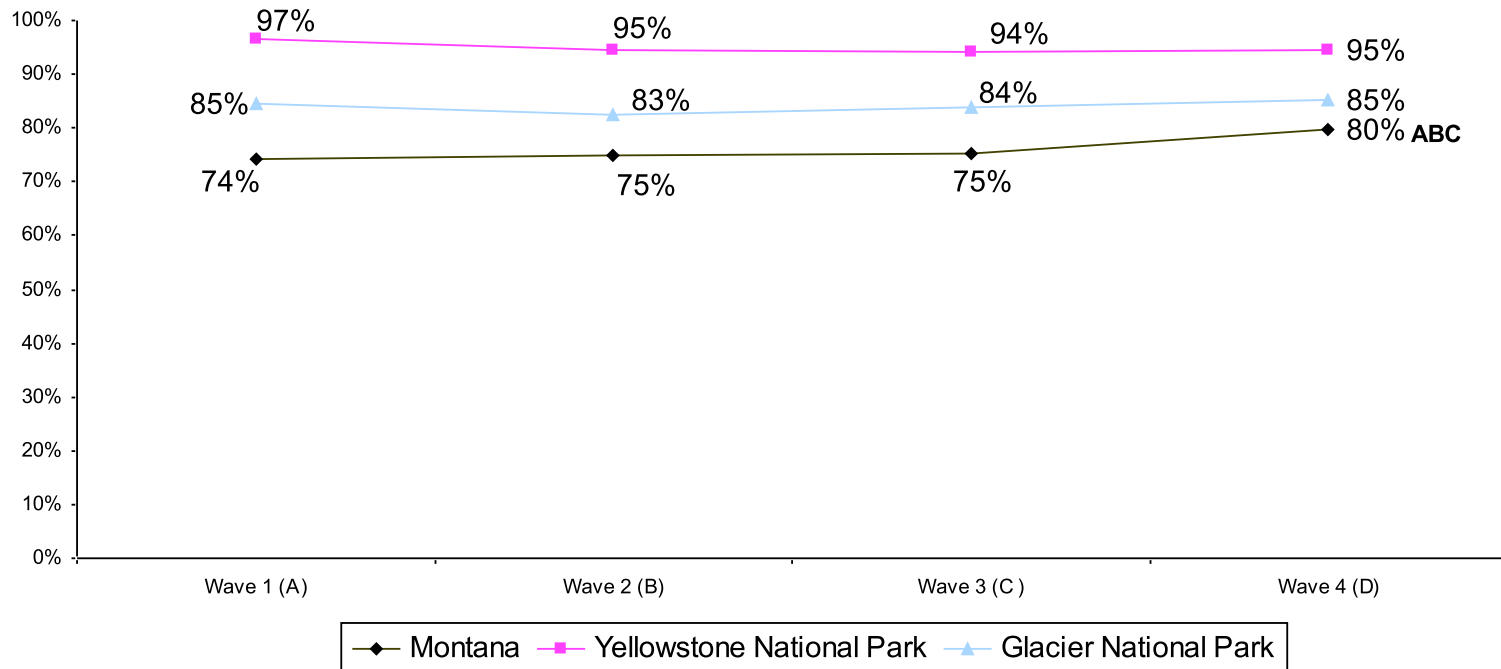


Montana awareness increases across waves

Q: Are you aware of the following locations as travel destinations?

Aided awareness of Montana significantly increases in Wave 4 over all Waves. Awareness of Glacier National Park and Yellowstone National Park remain stable.

Aided Awareness as a Travel Destination All Waves



Upper-case letters indicate the number is statistically higher than the value in the column referenced by the letter.

Base = 2,899 Geotravelers

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Familiarity with Montana remains stable

Q: How familiar are you with the following destinations?

There are no significant changes in familiarity with Montana as a travel destination in Wave 4. Seattle and Minneapolis show slight directional shifts upward in the number of Geotravelers who know Montana fairly well.

- Geotravelers in Wave 4 who are aware of Montana's advertising are significantly more likely to say they know Montana very well than those who are unaware of the advertising (14% vs. 9%).*
- In Seattle, Geotravelers aware of Montana's advertising in Wave 4 are significantly more likely to say they know Montana very well than those unaware of the advertising (18% vs. 7%).

Familiarity With Montana								
	Seattle W3 (A)	Seattle W4 (B)	Chicago W3 (C)	Chicago W4 (D)	Mnpls W3 (E)	Mnpls W4 (F)	National W3 (G)	National W4 (H)
Know this destination very well	12%	12%	8%	6%	12%	12%	7%	11%
Know this destination fairly well	32%	40%	19%	13%	28%	32%	21%	22%
Know a little about this destination	47%	38%	53%	61%	48%	46%	56%	51%
Not familiar at all	9%	10%	20%	19%	13%	10%	17%	16%

*Sub segment data noted throughout report available in the tabs.



Familiarity with Yellowstone National Park stable

Q: How familiar are you with the following destinations?

There are no significant shifts in familiarity with Yellowstone National Park in Wave 4. There are directional shifts upward in each market and the national sample over Wave 3.

- Geotravelers who are aware of Montana's advertising in Wave 4 are significantly more likely to say they know Yellowstone National Park very well than those unaware of the advertising (26% vs. 18%).
- Minneapolis Geotravelers who are aware of Montana's advertising are also more likely in Wave 4 to say they know Yellowstone National Park very well than those who are unaware of the advertising (27% vs. 13%).

Familiarity With Yellowstone National Park								
	Seattle W3 (A)	Seattle W4 (B)	Chicago W3 (C)	Chicago W4 (D)	Mnpls W3 (E)	Mnpls W4 (F)	National W3 (G)	National W4 (H)
Know this destination very well	19%	20%	16%	19%	15%	19%	19%	26%
Know this destination fairly well	36%	40%	31%	25%	42%	35%	34%	24%
Know a little about this destination	40%	34%	44%	48%	38%	43%	46%	44%
Not familiar at all	4%	6%	9%	8%	5%	4%	2%	6%

Base = Varies based on awareness



Glacier National Park familiarity stable

Q: How familiar are you with the following destinations?

Familiarity with Glacier National Park remains stable in Wave 4, with only Minneapolis Geotravelers showing a significant change. In that market, those who are not at all familiar with Glacier National Park significantly declines from 17% in Wave 3 to 10%.

- In Wave 4, Geotravelers who are aware of Montana's advertising are significantly more likely to know Glacier National Park fairly well than those unaware of the advertising (29% vs. 17%).

Familiarity With Glacier National Park								
	Seattle W3 (A)	Seattle W4 (B)	Chicago W3 (C)	Chicago W4 (D)	Mnpls W3 (E)	Mnpls W4 (F)	National W3 (G)	National W4 (H)
Know this destination very well	13%	14%	10%	7%	11%	13%	8%	9%
Know this destination fairly well	26%	25%	20%	14%	26%	26%	18%	13%
Know a little about this destination	46%	50%	50%	59%	46%	51%	57%	64%
Not familiar at all	15%	11%	21%	20%	17% (F)	10%	17%	14%

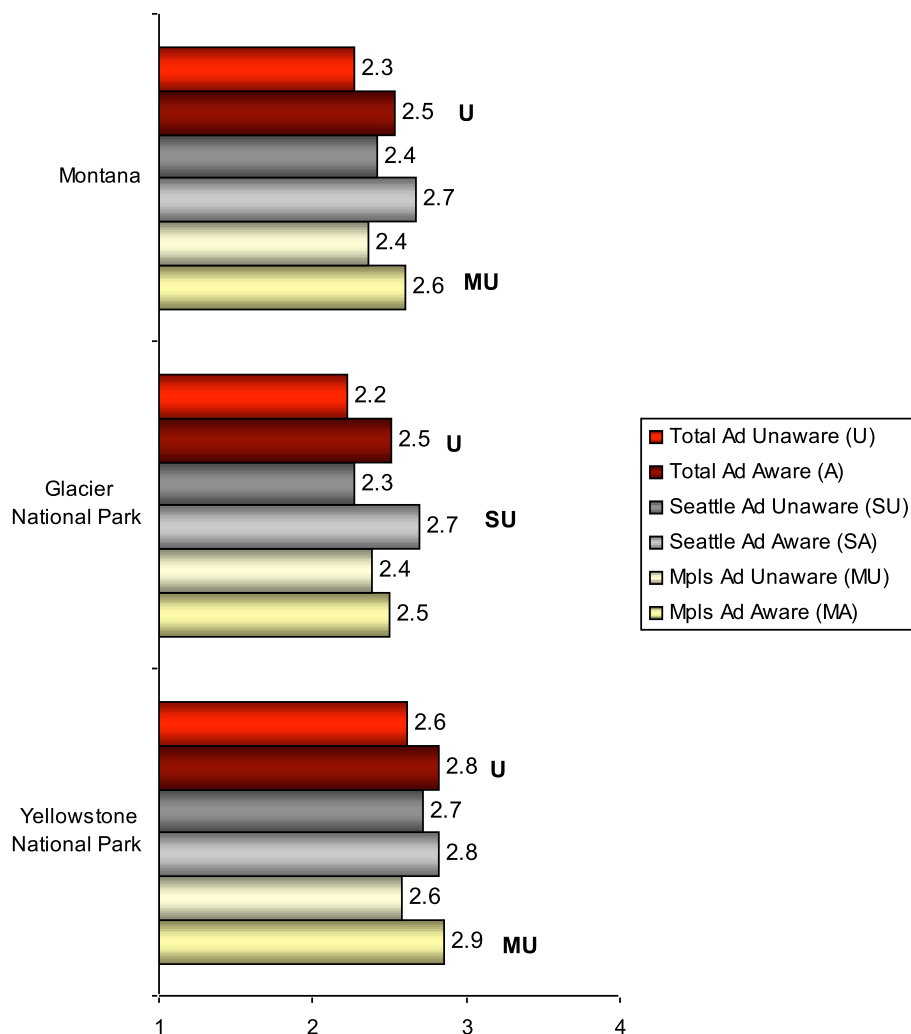
Upper-case letters indicate the number is statistically higher than the value in the column referenced by the letter.



Those aware of advertising more familiar

Q: How familiar are you with the following destinations?

Familiarity with Montana & National Parks Mean Score



In Wave 4, Geotravelers who are aware of Montana's advertising are significantly more familiar with the state and its national parks than those who are unaware of the advertising.

This is also true for Geotravelers who are aware of Montana's advertising in Seattle and Minneapolis.

There are no significant differences in Chicago's familiarity in Wave 4.

Base = Varies based on awareness



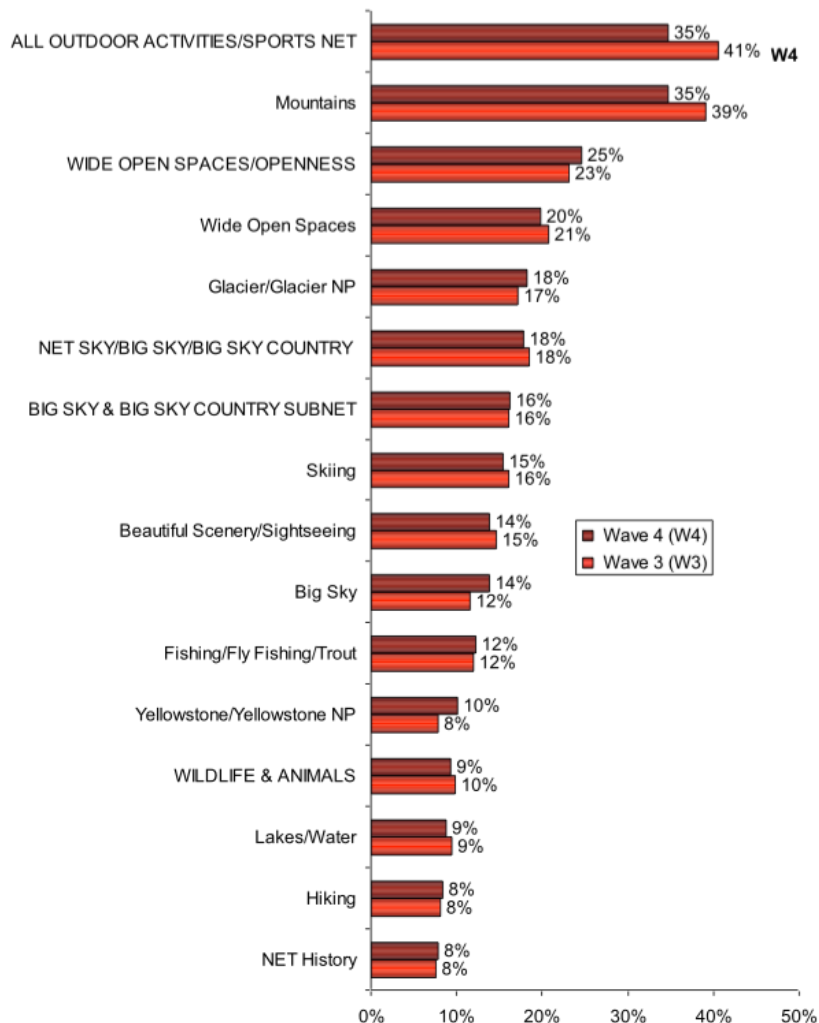


Montana = outdoor activities and mountains

Q: You mentioned being familiar with Montana as a travel destination. In your own words, please describe what comes to mind when you think of Montana?

Familiarity with Montana

Top 16



There is little change in what Geotravelers who are familiar with Montana associate with the travel destination in Wave 4.

Geotraveler Comments:

- "I really enjoy west glacier park. Lake McDonald is amazing. Whitefish and the brewery is fun."
- "So I know that Yellowstone is mostly in Wyoming, but when I think of Montana, I do still think of Yellowstone. I also think of Red Lodge, which is a beautiful place I would love to go back to again. I also think of great hiking, and the mountains, and fly-fishing, and eating good "cowboy" food, and I think of skiing in the winter time...western Montana is a paradise of vacation and adventure opportunities."
- "Big sky with open mountain vistas as well as edges of the plains, fantastic natural features and some interesting pieces of history."

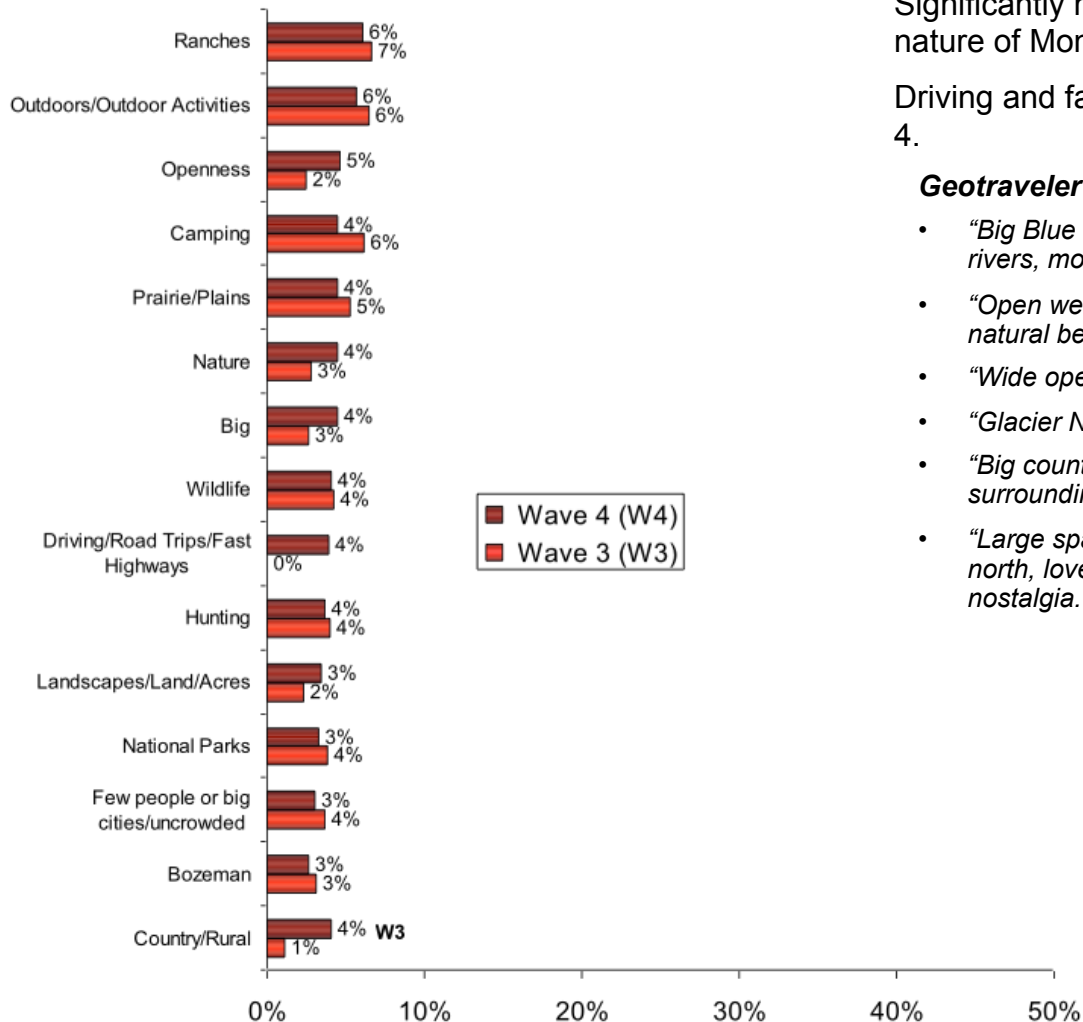
Base = 1,063 Geotravelers Familiar with Montana



Country and fast highways increase

Q: You mentioned being familiar with Montana as a travel destination. In your own words, please describe what comes to mind when you think of Montana?

Familiarity with Montana Next 15*



Base = 1,063 Geotravelers Familiar with Montana

Significantly more Geotravelers mention the country or rural nature of Montana in Wave 4 than did so in Wave 3.

Driving and fast highways also emerges as a response in Wave 4.

Geotraveler Comments:

- "Big Blue Skies, Fast Highways, beautiful scenery, wildlife, good BBQ, rivers, mountains, Native Americans."
- "Open western spaces, Yellowstone, Big Sky, lots of driving, mountains, natural beauty, rugged."
- "Wide open spaces, wilderness, rugged country."
- "Glacier National Park, Missoula, Country living."
- "Big country, outdoor destination full of clean living and amazing natural surroundings."
- "Large space, great small towns, gateway to Yellowstone from the north, love Bozeman, takes a whole day to drive across, feelings of nostalgia."

*Perceptions with lower than 3% incidence for all Geotravelers in Wave 4 not shown.



Advertising Awareness & Understanding



Unaided advertising awareness increases in all markets

Q: What destinations other than your home state have you seen or heard advertising for in the past three months or so?

Unaided awareness of Montana's advertising increases significantly in all three media markets and remains flat in the control (National) sample.

- Two in ten (21%) Minneapolis Geotravellers are aware of the advertising in Wave 4, followed by 19% in Seattle and 17% in Chicago.

Unaided Advertising Awareness								
	Seattle W3 (A)	Seattle W4 (B)	Chicago W3 (C)	Chicago W4 (D)	Mnpls W3 (E)	Mnpls W4 (F)	National W3 (G)	National W4 (H)
CALIFORNIA NET	45%	42%	26%	31%	17%	17%	30%	32%
FLORIDA NET	20%	27%	53% (D)	29%	40% (F)	23%	38% (H)	25%
NEW YORK NET	7%	17%	5%	10%	6%	15% (E)	11%	19%
NEVADA NET	29%	32%	22%	19%	24%	17%	24%	17%
COLORADO NET	7%	4%	9%	12%	12%	18% (E)	15%	17%
Texas	8%	10%	8%	10%	9%	8%	8%	13%
Michigan	1%	3%	30%	44%	3%	7%	5%	13%
North Carolina	1%	2%	2%	1%	1%	0%	5%	11%
Missouri	2%	1%	3%	12% (C)	6%	5%	1%	10% (G)
UTAH NET	7%	7%	5%	3%	5%	6%	15%	9%
WYOMING NET	2%	2%	0%	15% (C)	1%	11% (E)	4%	9%
South Carolina	1%	3%	1%	3%	1%	0%	6%	8%
Disney World/Disneyland	16%	14%	7%	7%	10%	11%	12%	6%
LOUISIANA NET	2%	4%	5%	3%	1%	2%	7%	6%
VIRGINIA NET	1%	2%	0%	1%	0%	-	3%	6%
ARIZONA NET	6%	7%	9%	6%	12% (F)	4%	14% (H)	5%
Hawaii	37%	35%	11%	6%	7%	9%	14%	5%
Alaska	14%	15%	3%	5%	9%	10%	11%	5%
TENNESSEE NET	1%	1%	3%	3%	2%	2%	3%	5%
MONTANA NET	9%	19% (A)	1%	17% (C)	6%	21% (E)	3%	4%
Maine	1%	-	0%	1%	1%	-	2%	4%
Pennsylvania	1%	-	-	1%	0%	-	2%	4%
Arkansas	1%	2%	-	2%	0%	1%	1%	4%
South Dakota	-	1%	1%	4%	16%	41% (E)	-	4%
GEORGIA NET	2%	1%	0%	1%	1%	1%	-	4%
Mexico	11%	7%	8%	8%	14% (F)	7%	5%	3%
MASSACHUSETTS NET	1%	2%	1%	-	-	2%	1%	3%
Ohio	-	-	0%	1%	0%	0%	1%	3%
Mississippi	-	-	-	-	1%	-	-	3%
Kansas	-	-	-	1%	-	1%	-	3%

Upper-case letters indicate the number is statistically higher than the value in the column referenced by the letter.

Base = 1,490 Geotravellers

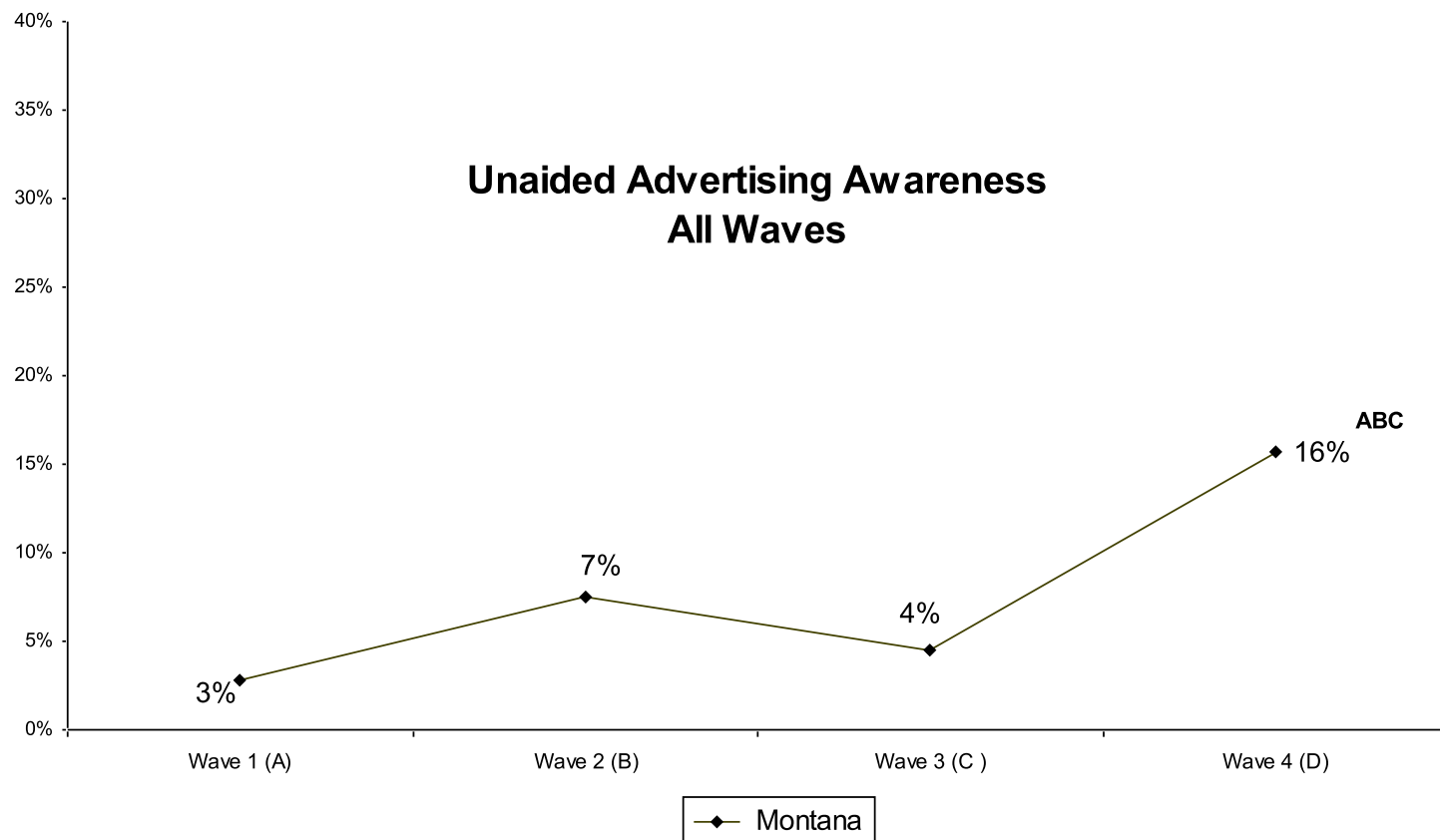
*NET includes mentions of specific cities or parks/attractions within that state. Destinations with lower than 3% awareness for the National W4 population not shown.



Total historical unaided advertising awareness rises

Q: What destinations other than your home state have you seen or heard advertising for in the past three months or so?

Total Geotraveler unaided awareness of advertising for Montana increases significantly in Wave 4.



Upper-case letters indicate the number is statistically higher than the value in the column referenced by the letter.

Base = 2,693 Geotravelers





Montana aided advertising awareness rises

Q: Please select all the out-of-state destinations listed below that you have seen or heard advertising for in the past three months or so.

Aided awareness of Montana's advertising increases significantly in all three media markets and remains flat in the control (National) sample.

- Over a third of Minneapolis Geotravelers (37%) and Seattle Geotravelers (35%) are aware of Montana's advertising in Wave 4, followed by 26% in Chicago.

Aided awareness of Yellowstone National Park (27%) and Glacier National Park (15%) increases significantly in Minneapolis over Wave 3.

Aided Advertising Awareness								
	Seattle W3 (A)	Seattle W4 (B)	Chicago W3 (C)	Chicago W4 (D)	Mnpls W3 (E)	Mnpls W4 (F)	National W3 (G)	National W4 (H)
California	73%	66%	49%	45%	39%	35%	42%	53%
Alaska	55%	57%	33%	29%	46%	50%	47%	40%
Colorado	15%	11%	26%	22%	33%	35%	37%	34%
Utah	22%	20%	11%	10%	11%	17%	28%	22%
Yellowstone National Park	15%	19%	11%	16%	13%	27% (E)	22%	19%
Michigan	6%	11%	64%	64%	16%	22%	13%	14%
Wyoming	7%	9%	8%	28% (C)	13%	30% (E)	11%	14%
Maine	4%	5%	6%	5%	6%	4%	10%	11%
Vermont	3%	6%	6%	4%	4%	3%	16%	10%
Glacier National Park	9%	14%	3%	5%	6%	15% (E)	13%	9%
Montana	23%	35% (A)	6%	26% (C)	20%	37% (E)	11%	9%
Oregon	23%	32%	3%	2%	5%	5%	7%	9%
Grand Teton National Park	3%	4%	4%	7%	2%	6% (E)	8%	8%
Washington	29%	28%	6%	5%	5%	7%	10%	7%
Rocky Mountain National Park	3%	5%	4%	2%	4%	6%	9%	6%
Idaho	17%	20%	4%	4%	2%	7% (E)	8%	4%
None of these	11%	9%	16%	12%	29% (F)	14%	20%	18%

Upper-case letters indicate the number is statistically higher than the value in the column referenced by the letter.

Base = 1,598 Geotravelers

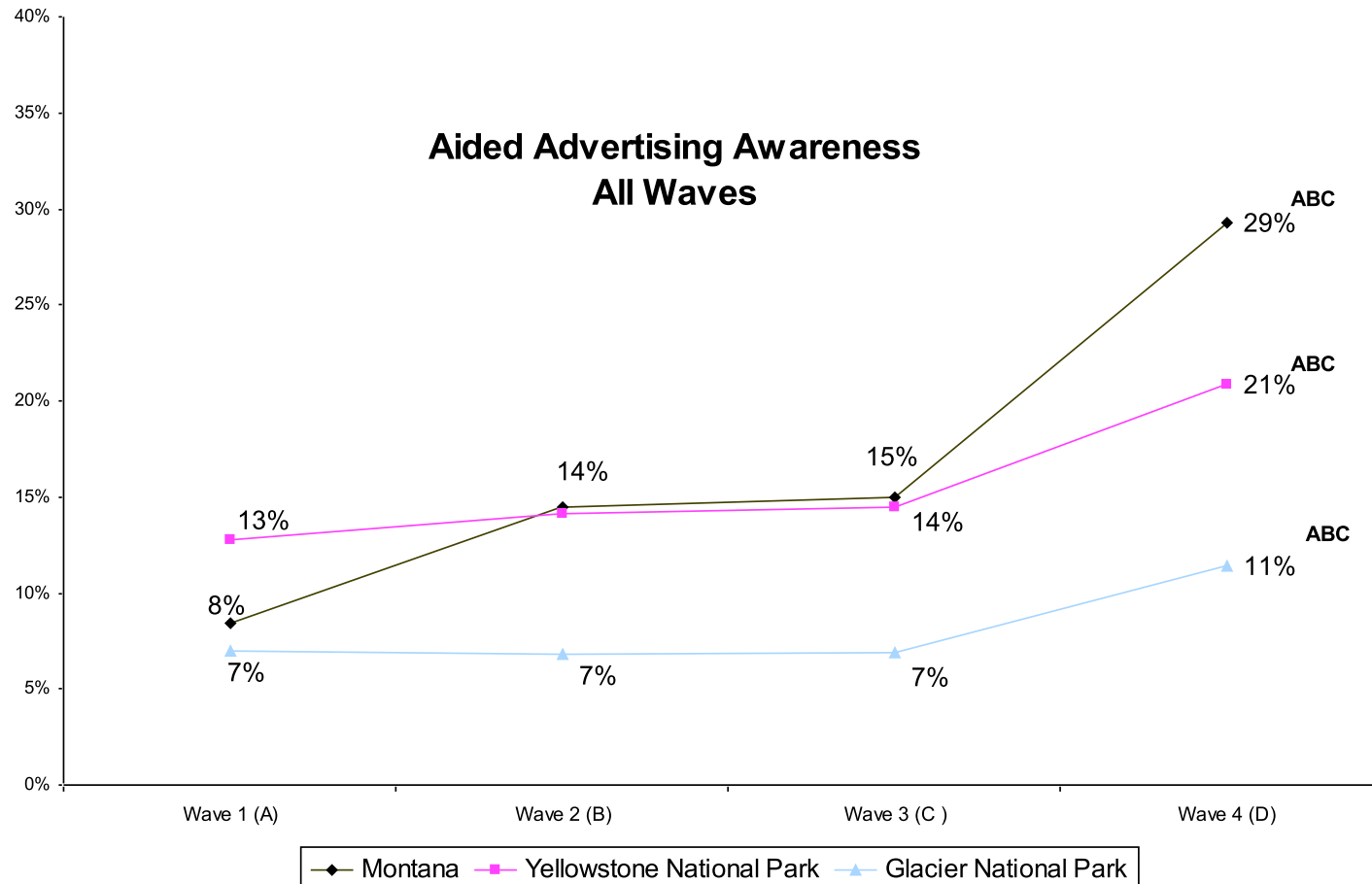




Total historical advertising awareness rises significantly

Q: Please select all the out-of-state destinations listed below that you have seen or heard advertising for in the past three months or so.

Total Geotraveler awareness of advertising for Montana, Yellowstone National Park and Glacier National Park increases significantly in Wave 4. Momentum gained between Wave 1 and Wave 2 is not lost in Wave 3.



Upper-case letters indicate the number is statistically higher than the value in the column referenced by the letter.

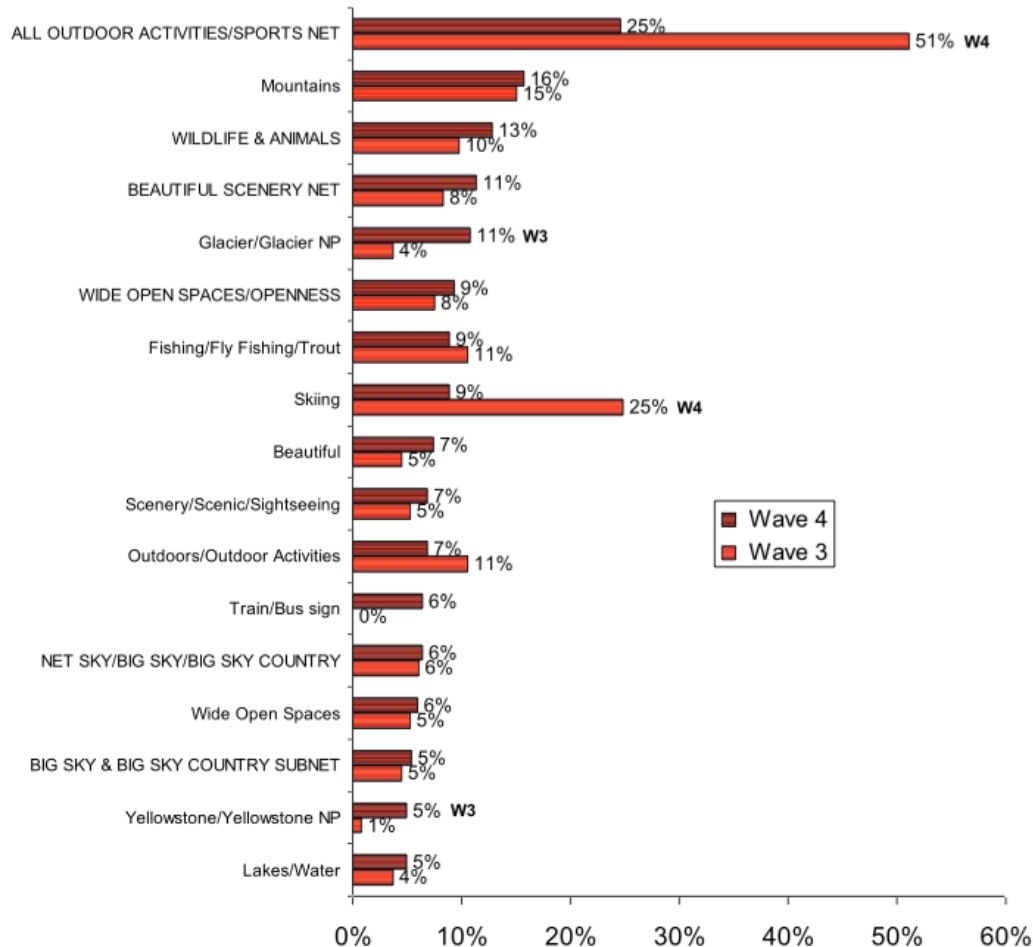
Base = 2,889 Geotravelers



National Parks feature in recalled advertising

Q: Please describe what you saw or heard in the Montana advertising to the best of your ability.

**Recall From Advertising
Top 17**



In Wave 4, significantly more Geotravelers who recall seeing Montana's advertising mention Glacier National Park (11%) and Yellowstone National Park (5%).

Geotravelers in Wave 4 recall scenic train and bus advertising specifically.

Geotraveler Comments

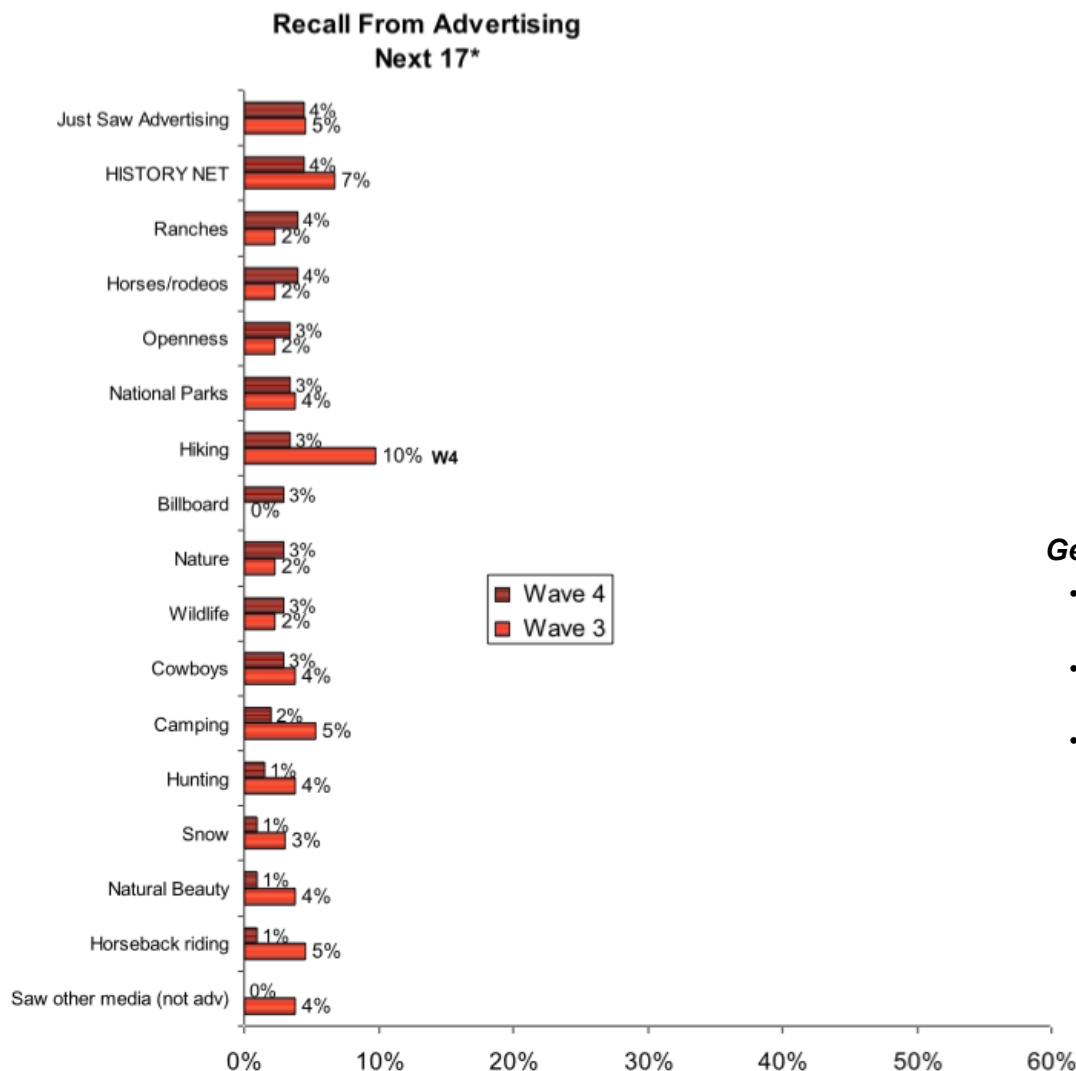
- "Buffalo, Glacier National Park, ranches and good skiing."
- "Glacier National Park, outdoor adventures, skiing/snow sports."
- "Yellowstone national park - geysers - bears - national parks, camping."
- "Print ads in windows and on busses for the wildlife in Glacier National Park."
- "The buses in Seattle have advertisements for Glacier National Park."
- "A huge bus sign. Took up the whole bus with a lot of colors."
- "The equivalent of bus-side ads (on trains) for Glacier. Bighorn sheep standing on a mountainside, I think."
- "Saw an ad for Yellowstone on the side of a Chicago Bus!"

Base = 336 Geotravelers Aware of Montana's Advertising



Scenic billboard advertising recalled in Wave 4

Q: Please describe what you saw or heard in the Montana advertising to the best of your ability.



Geotravelers in Wave 4 recall billboard advertising specifically.

Other shifts noted from Wave 3 to Wave 4 include declines in mention of specific outdoor activities like hiking, camping, hunting and horseback riding.

Geotraveler Comments

- "Saw billboard on side of bus, with picture of beautiful scenery."
- "Large billboard-type displays in downtown store windows."
- "There are a series of billboards around Chicagoland comparing Chicago landmarks to those offered in Montana."

Base = 336 Geotravelers Aware of Montana's Advertising





Recall from advertising across all Waves

Q: In your own words, what do you understand Montana offers as a travel destination after seeing the advertising?

Recall From Advertising				
Total Respondents Saw Advertising	Wave 1	Wave 2	Wave 3	Wave 4
ALL OUTDOOR ACTIVITIES/SPORTS NET	40%	24%	51%	25%
Mountains	12%	14%	15%	16%
WILDLIFE & ANIMALS	5%	14%	10%	13%
BEAUTIFUL SCENERY NET	10%	18%	8%	11%
Glacier/Glacier NP	9%	10%	4%	11%
WIDE OPEN SPACES/OPENNESS	12%	9%	8%	9%
Fishing/Fly Fishing/Trout	7%	4%	11%	9%
Skiing	21%	7%	25%	9%
Beautiful	7%	9%	5%	7%
Scenery/Scenic/Sightseeing	7%	15%	5%	7%
Outdoors/Outdoor Activities	7%	7%	11%	7%
Train/Bus sign	-	-	-	6%
NET SKY/BIG SKY/BIG SKY COUNTRY	2%	5%	7%	6%
Wide Open Spaces	7%	7%	5%	6%
Yellowstone/Yellowstone NP	3%	5%	1%	5%
Lakes/Water	2%	5%	4%	5%
Just Saw Advertising	10%	1%	5%	4%
HISTORY NET	9%	3%	7%	4%
Ranches	3%	1%	2%	4%
Horses/rodeos	2%	3%	2%	4%
Openness	5%	3%	2%	3%
National Parks	7%	-	4%	3%
Hiking	3%	3%	10%	3%
Billboard	-	-	-	3%
Nature	3%	3%	2%	3%
Wildlife	3%	4%	2%	3%
Cowboys	3%	1%	4%	3%
Camping	-	4%	5%	2%
Hunting	7%	4%	4%	1%
Snow	2%	1%	3%	1%
Natural Beauty	-	1%	4%	1%
Horseback riding	3%	4%	5%	1%
Saw other media (not adv)	-	-	4%	-

Mentions of Big Sky increase in 2010.

Geotraveler Comments

- "Big Sky."
- "Open country, hunting, big sky."
- "Big water, big sky, not sharing with lots of people."
- "Big Sky Beautiful scenery."
- "Big Sky ski resort - zipline, white water rafting, horseback riding."
- "Big Sky is the largest ski area in the U.S. including Moonlight Basin."

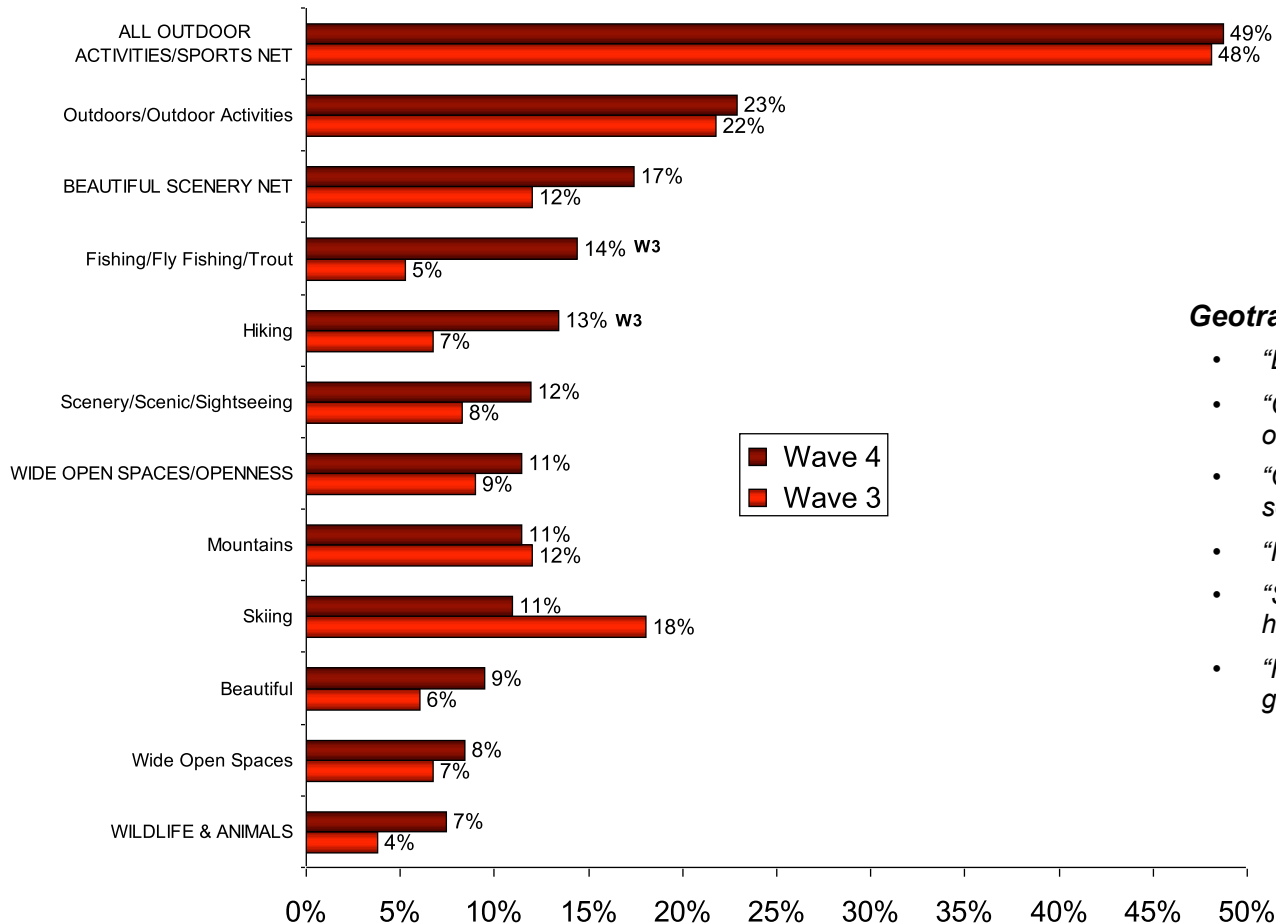
Base = Geotravelers Aware of Montana's Advertising, Each Wave



Which translates to what Montana offers

Q: In your own words, what do you understand Montana offers as a travel destination after seeing the advertising?

**Montana Offers Based on Advertising
Top 12**



The scenic images seen on trains, buses and billboards continue to enhance Geotravelers perception that Montana would offer them beautiful scenery, fishing and hiking.

Geotraveler Comments

- "Beautiful scenery, great family experience."
- "Gorgeous open spaces, mountains, rivers, outdoor activities."
- "Open areas of nature, good for hiking and seeing a more wild-west lifestyle."
- "National parks and grand outdoor scenery."
- "See animals and scenery that is different than here in Minnesota."
- "Hiking in the mountains, great mountain views, great fishing."

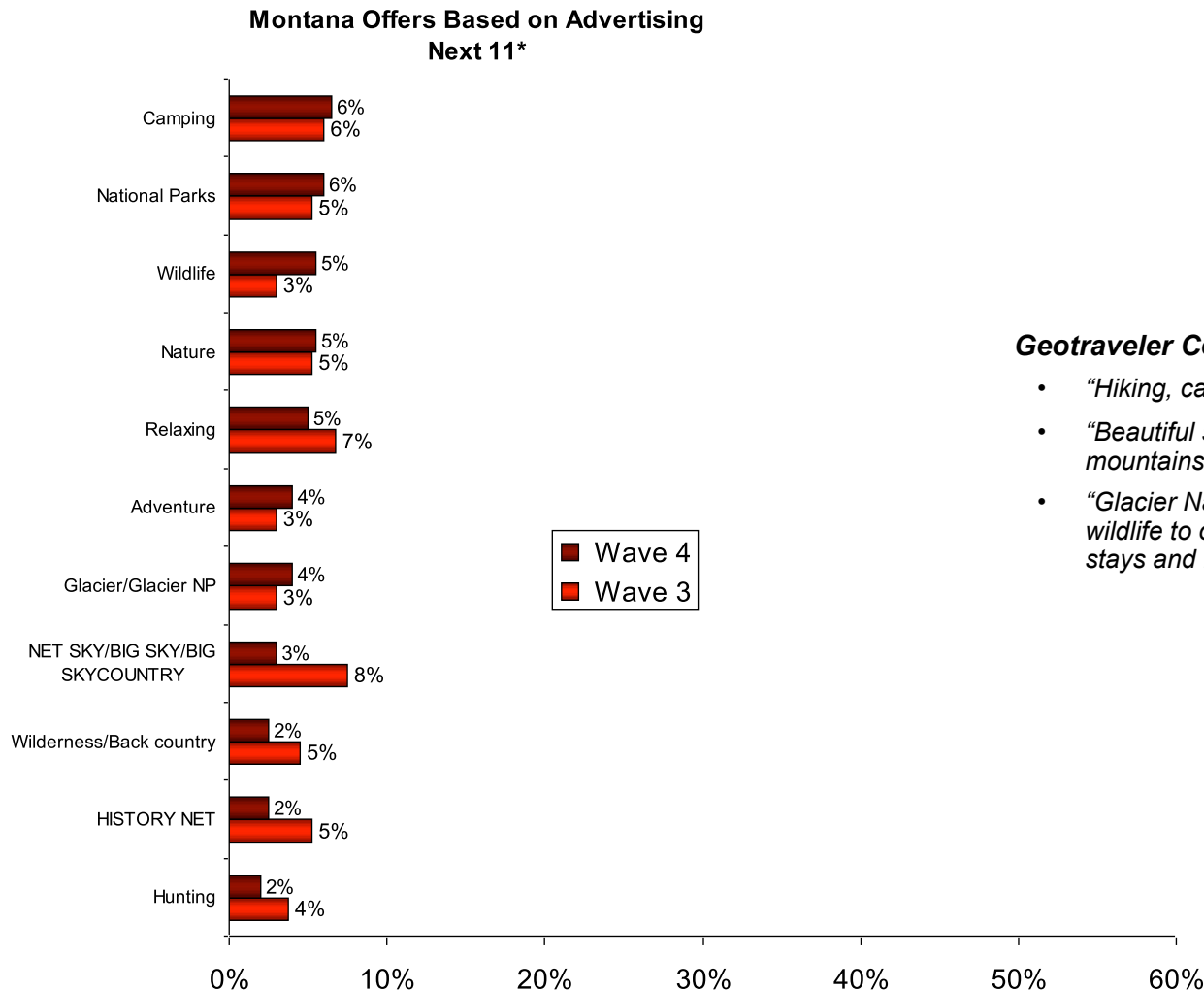
Base = 334 Geotravelers Aware of Montana's Advertising





Which translates to what Montana offers

Q: In your own words, what do you understand Montana offers as a travel destination after seeing the advertising?



Camping, national parks, wildlife, nature and adventure continue to be perceived as Montana offerings based on the advertising.

Geotraveler Comments

- *"Hiking, camping, all outdoor activities, great scenery, etc."*
- *"Beautiful scenery and outdoor activities - camping, mountains."*
- *"Glacier National Park, with hiking and camping and wildlife to observe, rental cabins. I've also heard of ranch stays and fly fishing around there."*

Base = 334 Geotravellers Aware of Montana's Advertising



What Montana Offers across all Waves

Q: In your own words, what do you understand Montana offers as a travel destination after seeing the advertising?

Montana Offers Based on Advertising				
Total Respondents Saw Advertising	Wave 1	Wave 2	Wave 3	Wave 4
ALL OUTDOOR ACTIVITIES/SPORTS NET	50%	43%	48%	49%
Outdoors/Outdoor Activities	20%	21%	22%	23%
BEAUTIFUL SCENERY NET	12%	19%	12%	17%
Fishing/Fly Fishing/Trout	3%	7%	5%	14%
Hiking	8%	11%	7%	13%
Scenery/Scenic/Sightseeing	9%	9%	8%	12%
Mountains	7%	3%	12%	11%
WIDE OPEN SPACES/OPENNESS	15%	13%	9%	11%
Skiing	15%	8%	18%	11%
Beautiful	9%	9%	6%	9%
Wide Open Spaces	10%	11%	7%	8%
WILDLIFE & ANIMALS	10%	3%	4%	7%
Camping	5%	3%	6%	6%
National Parks	3%	6%	5%	6%
Nature	5%	11%	5%	5%
Wildlife	7%	2%	3%	5%
Relaxing	7%	8%	7%	5%
Glacier/Glacier NP	3%	4%	3%	4%
Adventure	2%	6%	3%	4%
NET SKY/BIG SKY/BIG SKY COUNTRY	-	4%	8%	3%
HISTORY NET	14%	3%	5%	2%
Wilderness/Back country	-	1%	5%	2%
Hunting	8%	4%	4%	2%

Base = Geotravelers Aware of Montana's Advertising, Each Wave



Billboards and radio increase in Wave 4

Q: Where did you see or hear the advertising for Montana? (Select all that apply)

Magazines, the dominant source for advertising in Wave 3, significantly declines in Wave 4 for all Geotravelers who recall seeing advertising for Montana.

One in four (25%) Geotravelers recall seeing billboards and 12% recall hearing radio advertising for Montana in Wave 4; significant increases compared to Wave 3.

Geotravelers aware of the advertising in Minneapolis in Wave 4 are significantly more likely to recall seeing it on billboards (21%) and hearing radio ads (11%) compared to Wave 3.

Seattle Geotravelers aware of the advertising in Wave 4 also show a significant increase in recalling radio ads for Montana over Wave 3.

Where See Montana Advertising										
	Seattle W3 (A)	Seattle W4 (B)	Chicago W3 (C)	Chicago W4 (D)	Mnpls W3 (E)	Mnpls W4 (F)	National W3 (G)	National W4 (H)	TOTAL W3 (I)	TOTAL W4 (J)
Television	37%	40%	31%	35%	54%	49%	44%	40%	44%	43%
Magazine	56%	38%	81% (D)	30%	59% (F)	31%	72%	70%	62% (J)	35%
Internet	9%	8%	25%	2%	16%	12%	28%	20%	17%	9%
Newspaper	16%	11%	13%	9%	14%	11%	6%	0%	14%	10%
Billboard/Busboard	21%	29%	13%	33%	5%	21% (E)	0%	0%	11%	25% (I)
Radio	2%	15% (A)	19%	9%	2%	11% (E)	0%	0%	4%	12% (I)
Other	2%	7%	0%	7%	9%	5%	0%	0%	5%	6%

Upper-case letters indicate the number is statistically higher than the value in the column referenced by the letter.

Base = 334 Geotravelers Aware of Montana's Advertising



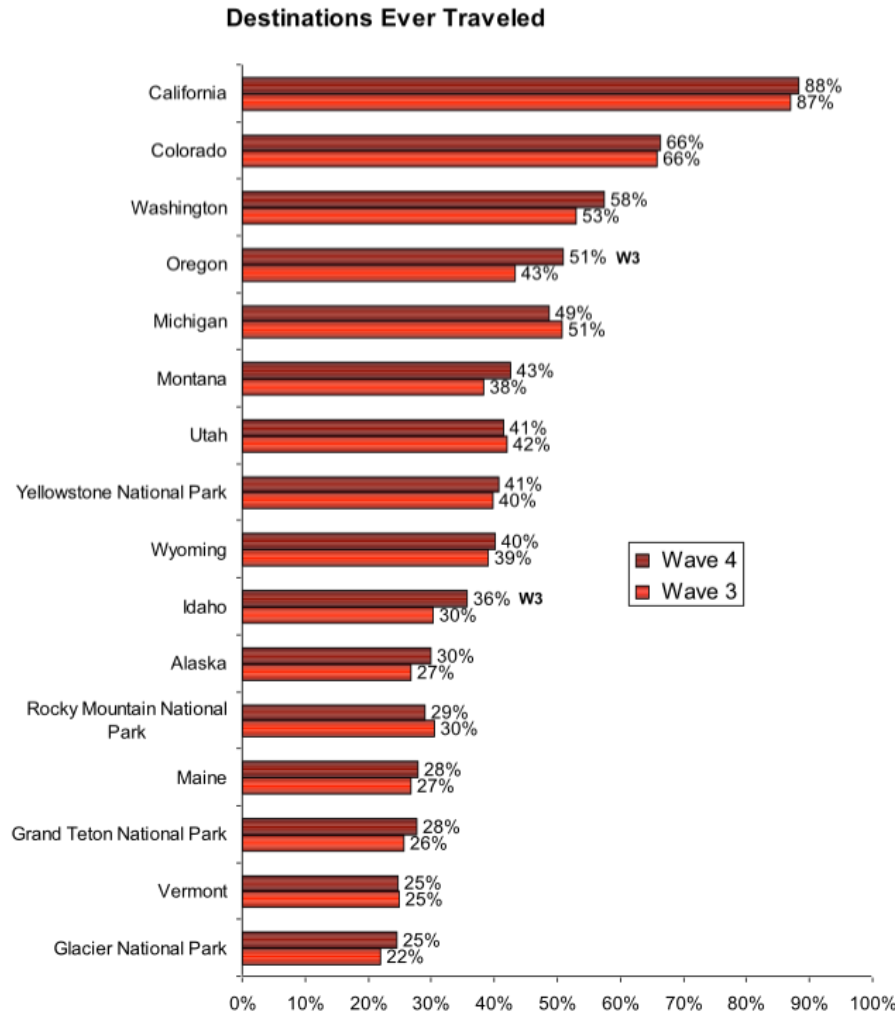


Travel Consideration & Process



One in four have traveled to Glacier National Park

Q: As an adult, have you ever traveled to any of the following destinations?



- The percentage of total Geotravelers who have visited the various destinations remains relatively stable in Wave 4.
- Glacier National Park has been visited by 25% of Geotravelers in Wave 4.

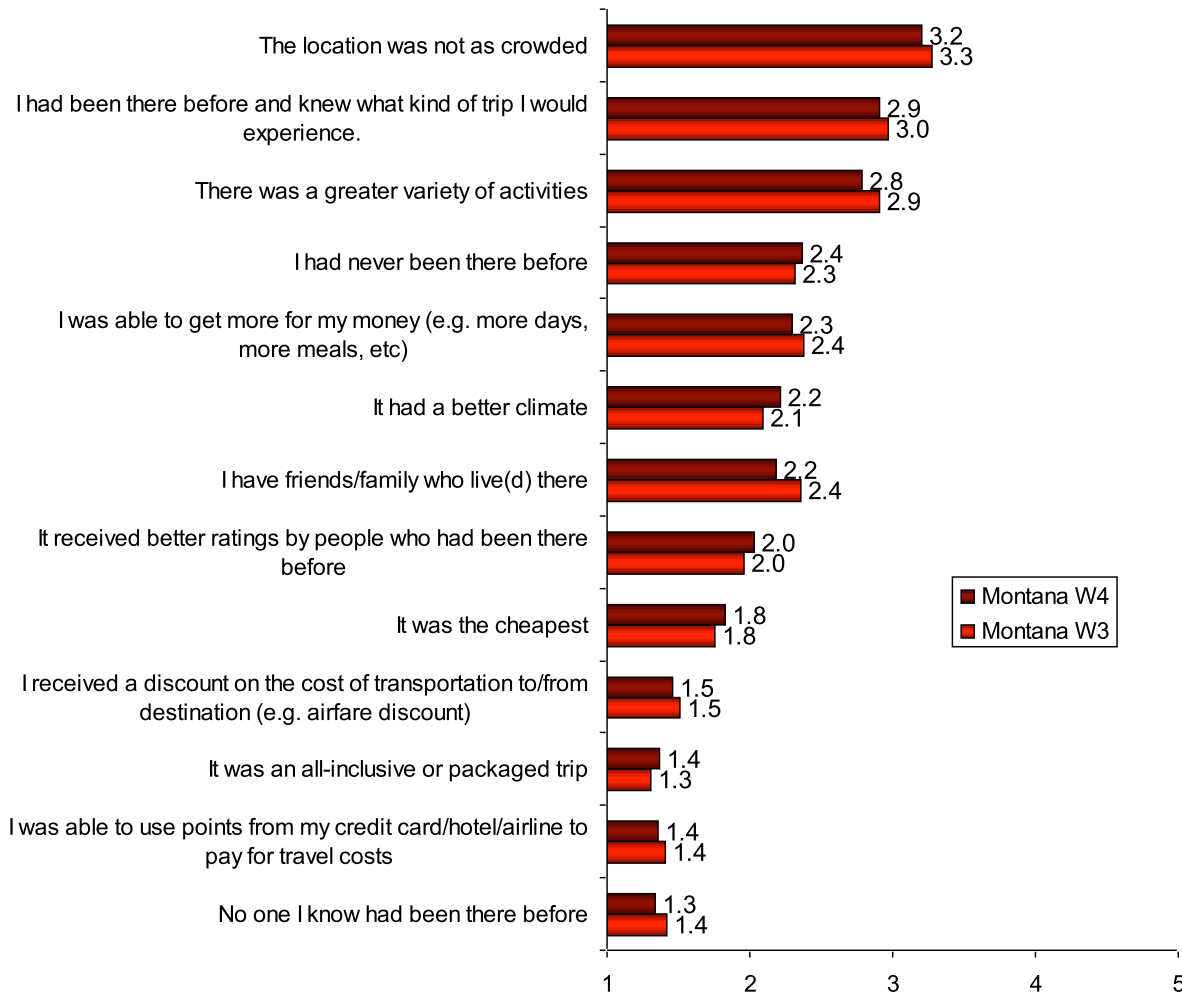
Base = 1,549 Geotravelers



Uncrowded remains top draw to Montana for past visitors

Q: Thinking about your last trip to [Destination] what made you choose [Destination] over another destination you were considering? Please rank the following factors in choosing on a scale of 1-5 where 1 is not at all influential and 5 is very influential.

Montana Travel Considerations Mean Score



- There are no significant changes between Wave 3 and Wave 4 in what influences Geotravelers to select Montana as a travel destination. Other destinations remain stable as well.

Base = 623 Geotravelers who have traveled to Montana



Seattle Geotravelers drawn by previous visits

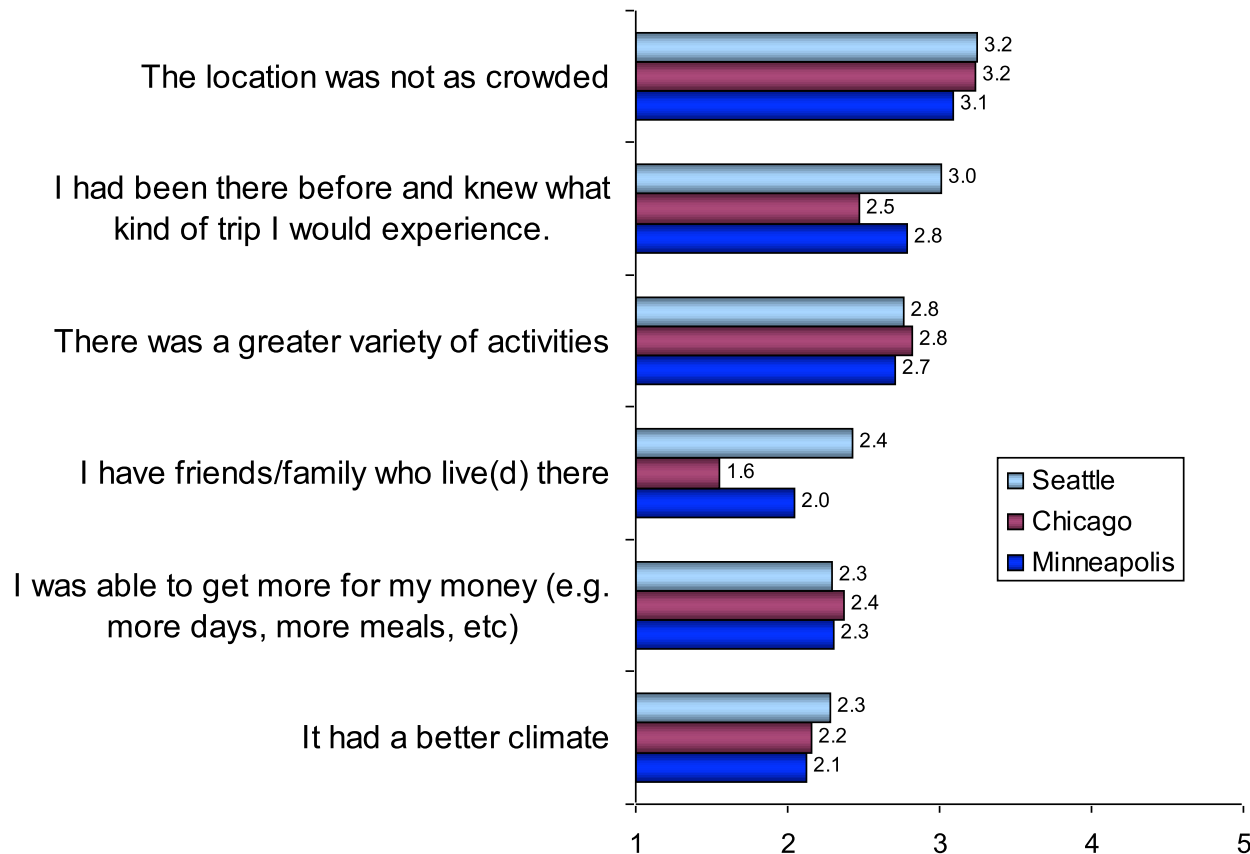
Q: Thinking about your last trip to [Destination] what made you choose [Destination] over another destination you were considering? Please rank the following factors in choosing on a scale of 1-5 where 1 is not at all influential and 5 is very influential.

Top Montana Travel Considerations By City

Wave 4

Top 6

Mean Score



- Previous trips influenced Geotravelers in Seattle the most, knowing what kind of trip they will experience (uncrowded, variety of activities) as well as having family and friends there.

Base = 292 Geotravelers who have traveled to Montana





The opposite is true for Chicago Geotravelers

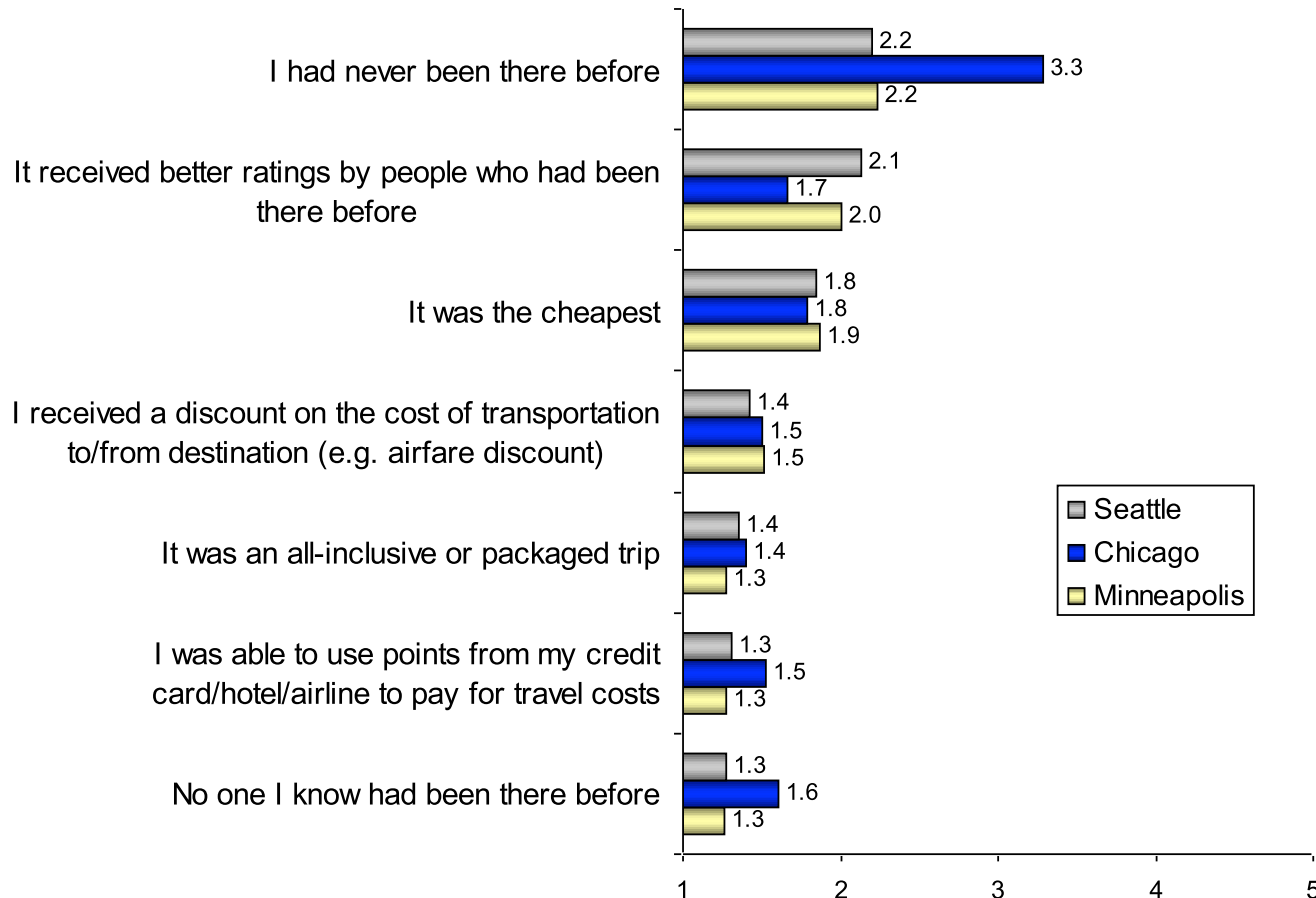
Q: Thinking about your last trip to [Destination] what made you choose [Destination] over another destination you were considering? Please rank the following factors in choosing on a scale of 1-5 where 1 is not at all influential and 5 is very influential.

Montana Travel Considerations By City

Wave 4

Next 7

Mean Score



- Geotravelers in Chicago cite *never* having been to Montana as their top reason to visit.

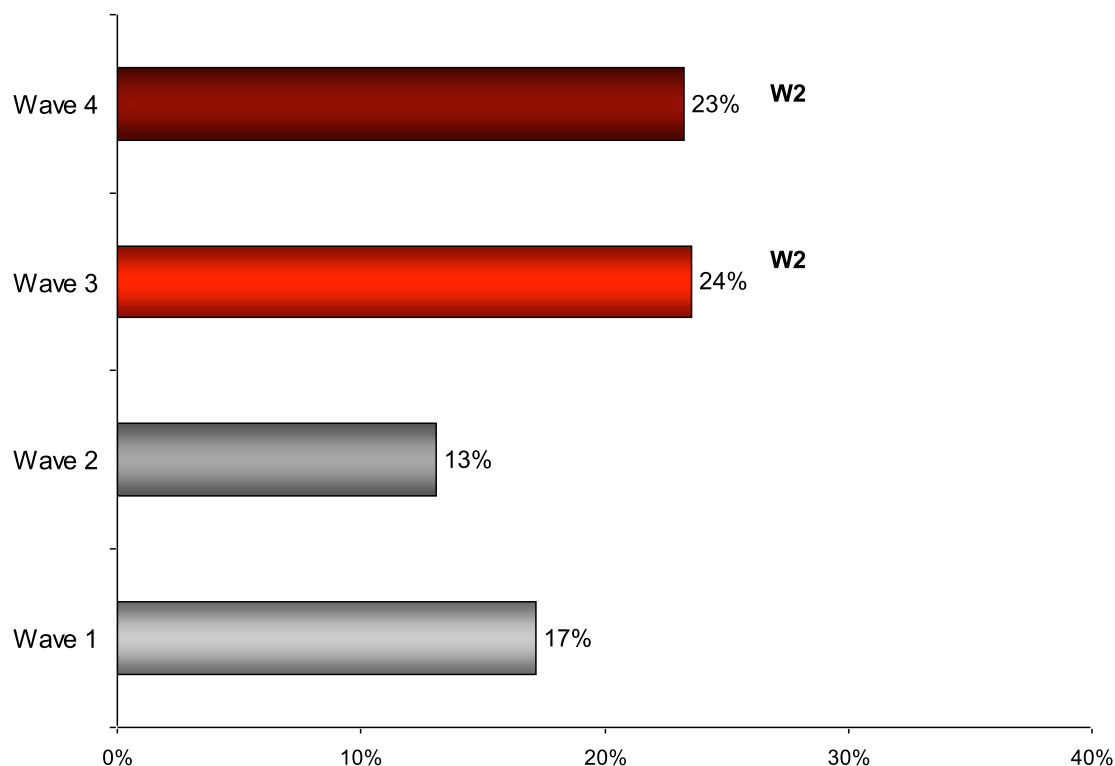


Travel plans to Montana increase over 2009

Q: What is the possibility that you will travel to the following destination in the next 18 months? (1-5 point scale)

Likelihood to Travel to Montana All Waves (4 or 5 Score)

- Geotraveler's travel plans for Montana shift little between Wave 1 and 2 or between Wave 3 and 4. However, their likelihood to travel to Montana increases significantly year over year.



Upper-case letters indicate the number is statistically higher than the value in the Wave referenced by the letter.

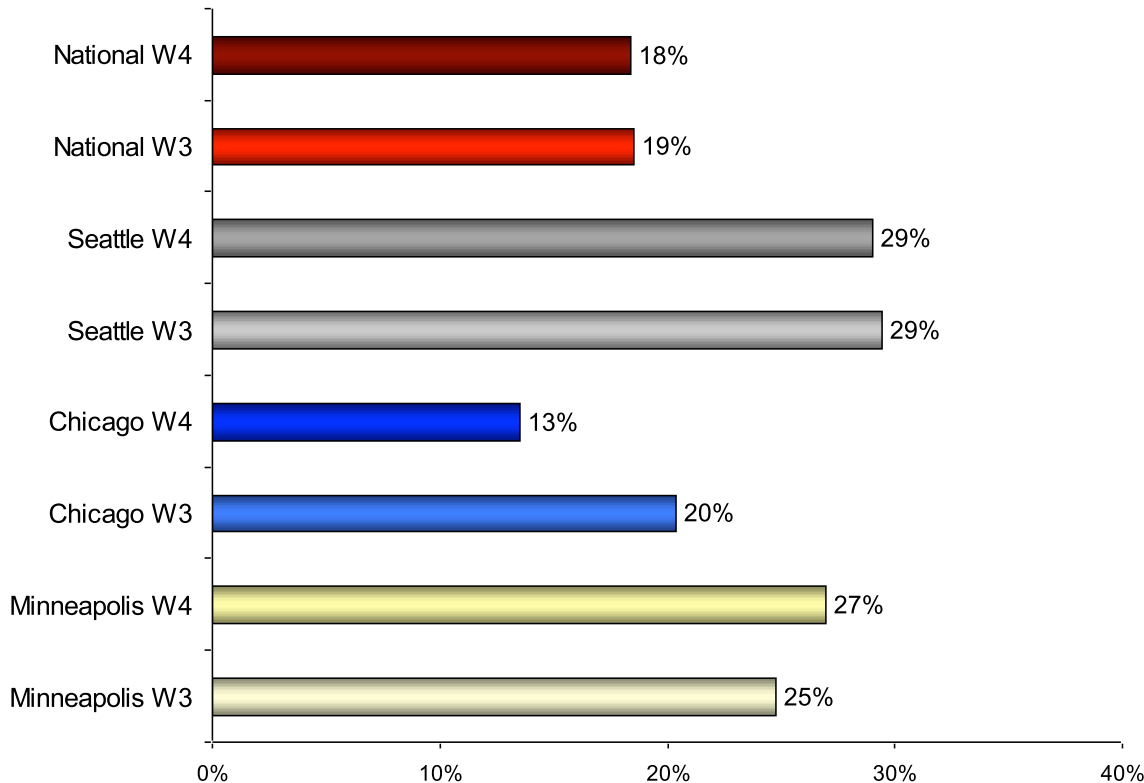
Base = 1,238 Geotravelers



Travel plans by market change little in Wave 3 vs. 4

Q: What is the possibility that you will travel to the following destination in the next 18 months? (1-5 point scale)

Likelihood to Travel to Montana (4 or 5 Score)



- Geotravelers' likelihood to travel to Montana remains steady in Wave 4 with those in Seattle and Minneapolis showing more intent than those in Chicago.
- There are no significant shifts in Geotravelers intent to travel to Montana compared to Wave 3.

Upper-case letters indicate the number is statistically higher than the value in the column referenced by the letter.

Base = 1,238 Geotravelers

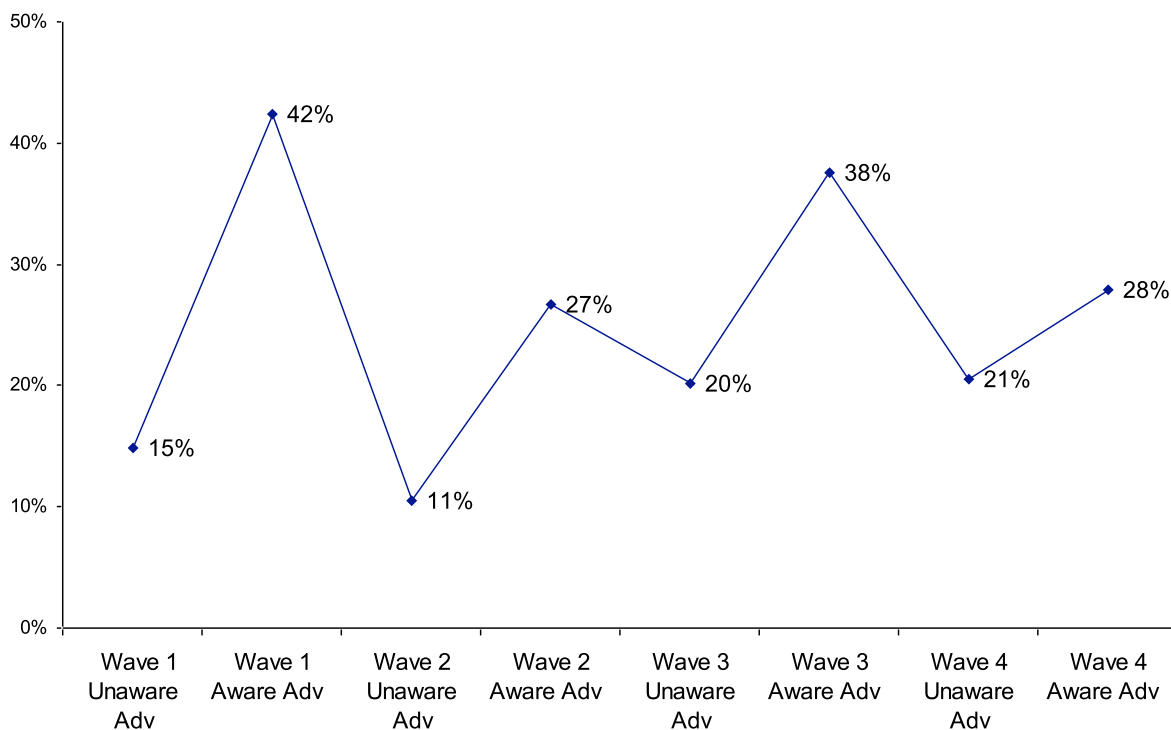




Those aware of advertising more likely to travel to MT

Q: What is the possibility that you will travel to the following destination in the next 18 months? (1-5 point scale)

Likelihood to Travel to Montana
All Waves (4 or 5 Score)
Aware Advertising vs. Unaware



- In all waves, if Geotravelers are aware of Montana's advertising they are more likely to plan to travel to Montana.
- In Wave 4, Geotravelers are 33% more likely to travel to Montana if they are aware of the advertising. (Difference between 21% and 28%).

Base = 2,889 Geotravelers

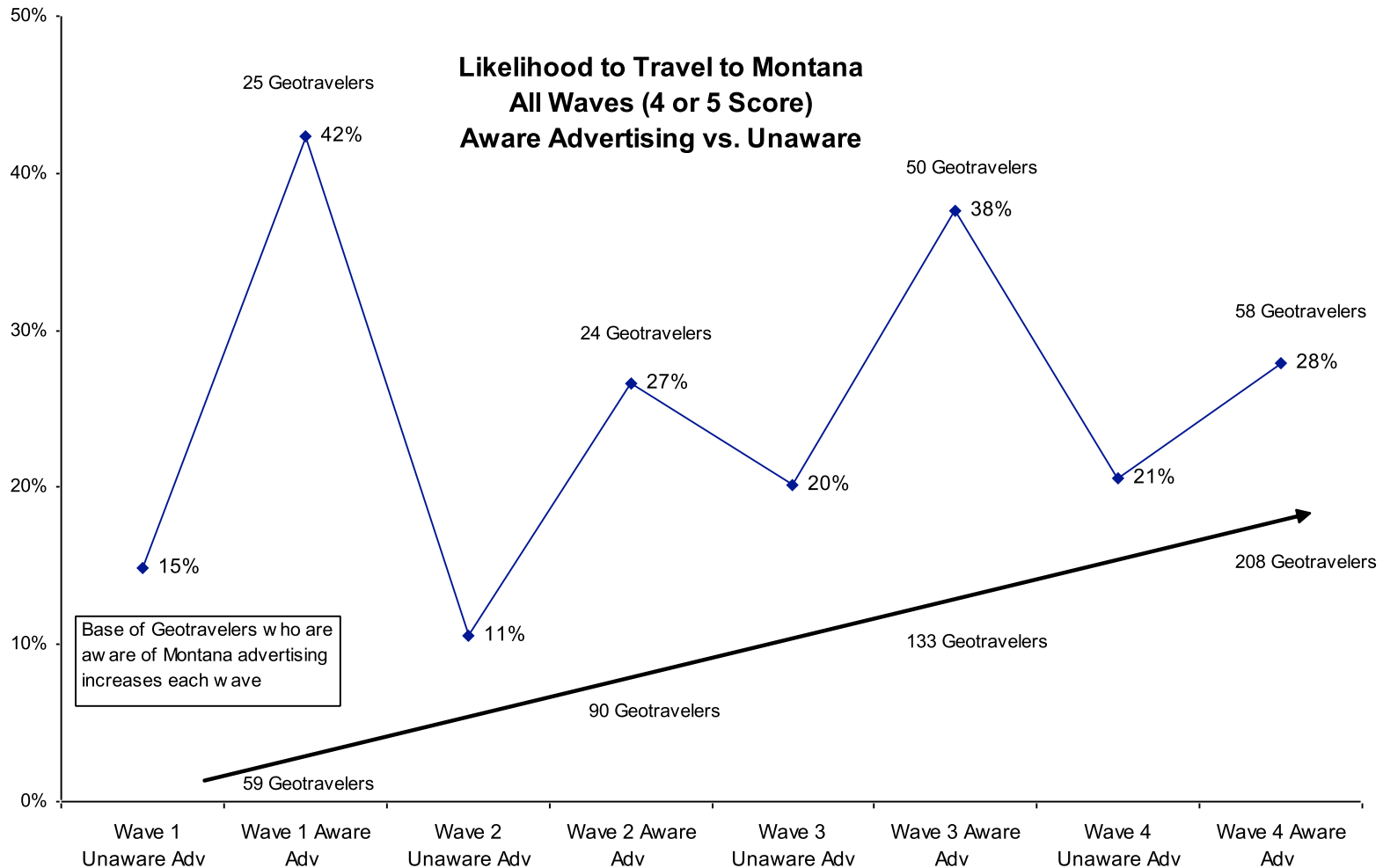




Increase in ad aware population over time

Q: What is the possibility that you will travel to the following destination in the next 18 months? (1-5 point scale)

- This difference is more pronounced in Wave 1, which has a smaller base size of Geotravelers aware of Montana advertising. As the number of Geotravelers who are aware of the advertising increases, the percentage difference is less dramatic but more stable and less likely to be driven by those thinking of traveling to Montana being pre-disposed to notice and recall MT advertising. See next page to illustrate this point.

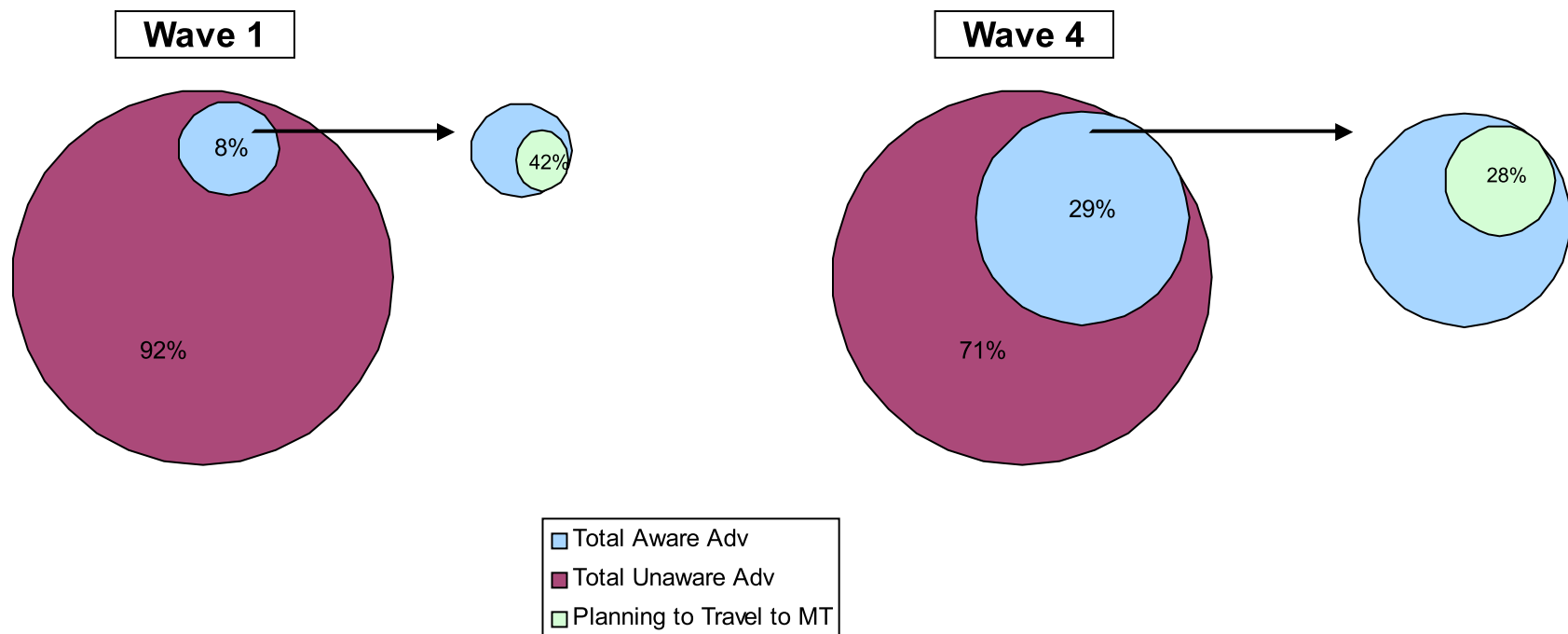




Leads to more Geotravelers likely to travel to MT

Q: What is the possibility that you will travel to the following destination in the next 18 months? (1-5 point scale)

- In Wave 1 just 8% of Geotravelers were aware of Montana's advertising. Forty-two percent of that 8% were planning to travel to Montana.
- In Wave 4, awareness of Montana's advertising has increased to 29%. Twenty-eight percent of that 29% are planning to travel to Montana. While a smaller percentage, this 28% represents many more Geotravelers who are reached by the advertising and planning to travel to Montana.





Glacier National Park drives interest in visiting Montana

Q: In your own words, what makes you **inclined** to travel to Montana?

Why Inclined to Travel to Montana				
	Wave 1	Wave 2	Wave 3	Wave 4
Friends/Family	27%	23%	29%	26%
Glacier/Glacier NP	21%	21%	12%	25%
ALL OUTDOOR ACTIVITIES/	21%	22%	28%	22%
Previous Visit	5%	18%	17%	12%
BEAUTIFUL SCENERY NET	9%	18%	17%	10%
Yellowstone/Yellowstone NP	15%	12%	9%	9%
Skiing	5%	-	7%	8%
National Parks	3%	4%	8%	6%
Fishing/Fly Fishing/Trout	4%	4%	3%	6%
Love Montana	5%	17%	8%	5%
Camping	3%	4%	6%	5%
Hiking	5%	4%	7%	4%
Mountains	8%	5%	6%	4%
Western	-	3%	3%	4%
Driving/Fast highways	-	-	-	4%
Wilderness/Back country	2%	1%	2%	3%

*Comments with lower than 3% incidence in W4 not shown.

**While significant, results directional due to small base size.

Base = 283 Geotravelers Might or Definitely Will Travel to MT

The number of Geotravelers who mention Glacier National Park** as a reason they are considering traveling to Montana in the next 18 months increases significantly in Wave 4.

Geotraveler Comments:

- *"Never been to Glacier, always wanted to go."*
- *"Mainly to visit Glacier National Park and Yellowstone. I love nature, camping and want to introduce my kids to the grandeur that mother nature provides in these two parks."*
- *"I also would like to get to Glacier Park while there are still Glaciers to see."*

Friends/family, outdoor activities, and scenery remain strong attractions.

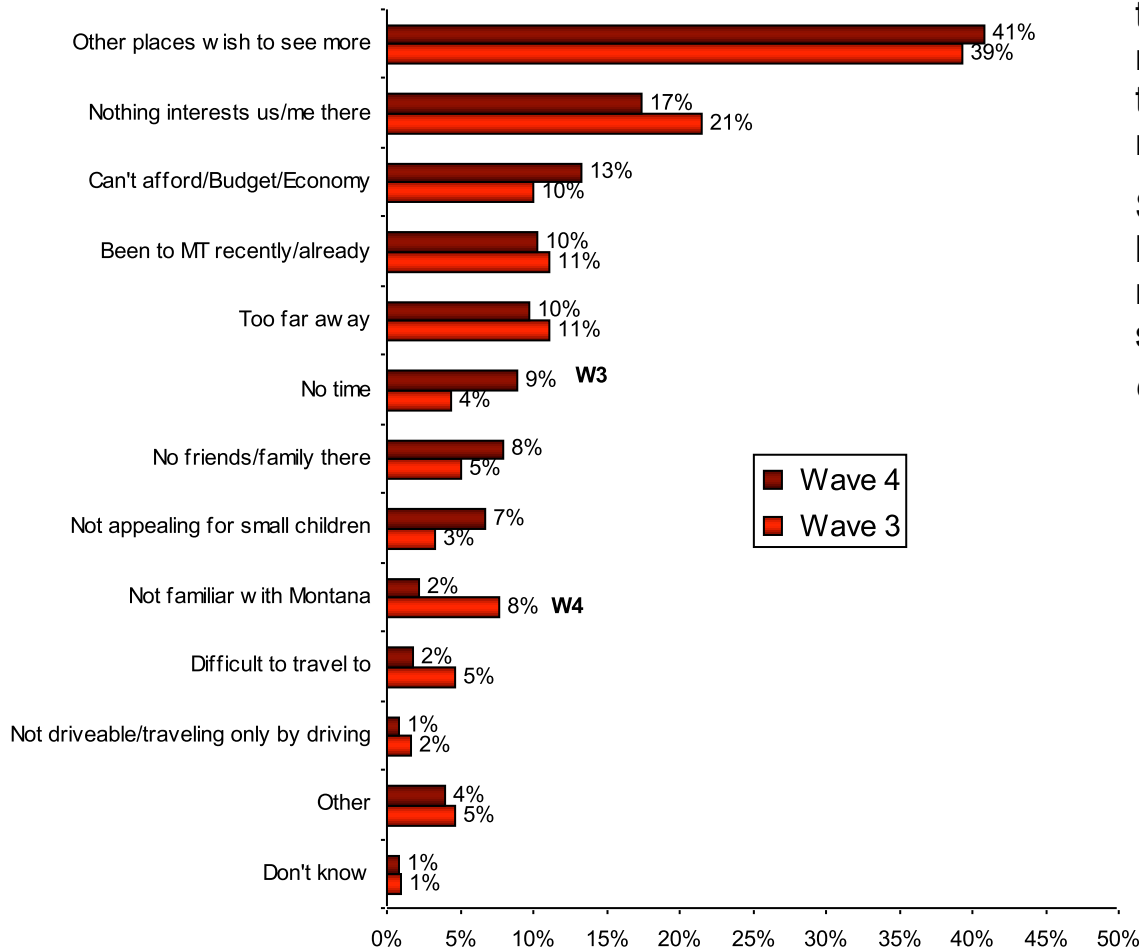
- *"Friends live there; I've been there before - had a great time hiking & skiing, and some relaxing tubing & fishing on a couple different rivers. Some excellent motorcycling opportunities as well."*
- *"Yes - I love Montana. I do think the natural beauty of Montana - the mountains, Yellowstone, the trout streams - it's unique and fantastic, and if I could afford it, I would probably go to Montana every year. I also like the culture there - it's a little odd, but it's also rugged... Montana retains some of its cowboy-like roots, and there's something about the place that just feels, very... American. When I think of the American West, I automatically think Montana."*
- *"Pure unspoiled western experience."*



Other destinations taking precedence

Q: In your own words, what makes you **less** inclined to travel to Montana?

Why Not Inclined to Travel to Montana



Other destinations taking precedence for travel time and budget remains the top reason Geotravelers cite for not planning to travel to Montana in the next 18 months.

Significantly fewer Geotravelers mention a lack of familiarity with Montana as a reason for not planning to travel to the state in Wave 4.*

Geotraveler Comments:

- "Montana is on my list of places to get to eventually like many other places but it's not on my short term list of places to get to."*
- "The distance and that I don't expect to have enough extra money to travel to and fully enjoy a trip to Montana in the next 18 months."*
- "I never thought about traveling to Montana. I know there would be a lot to do, friends have talked about it but I guess I'll have to think about going. The thought of spending time in the outdoors and seeing nature is always a thrill for me."*

*While significant, results directional due to small base size.

Base = 523 Geotravelers Not Likely or Definitely will NOT travel to Montana



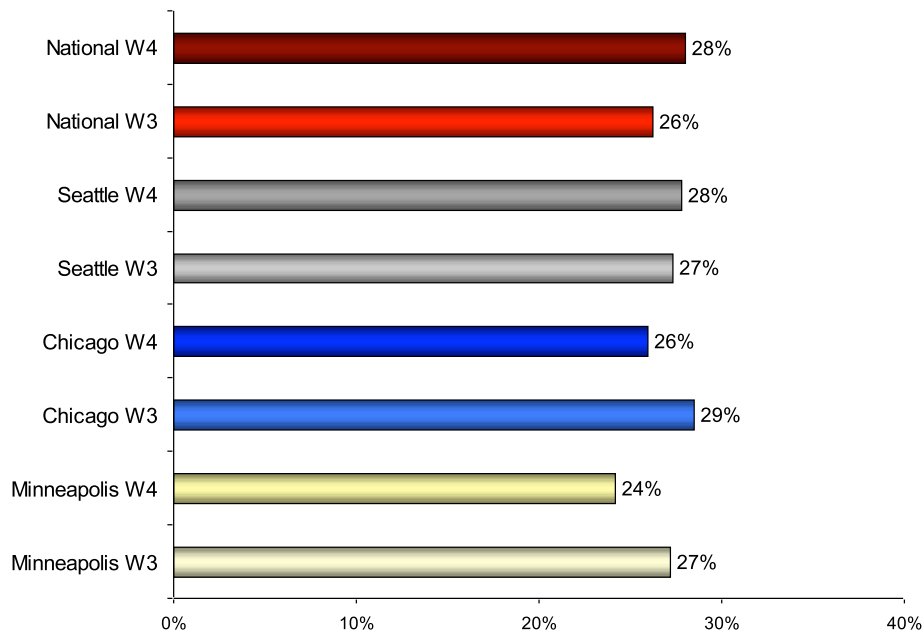


National Park Travel plans hold steady

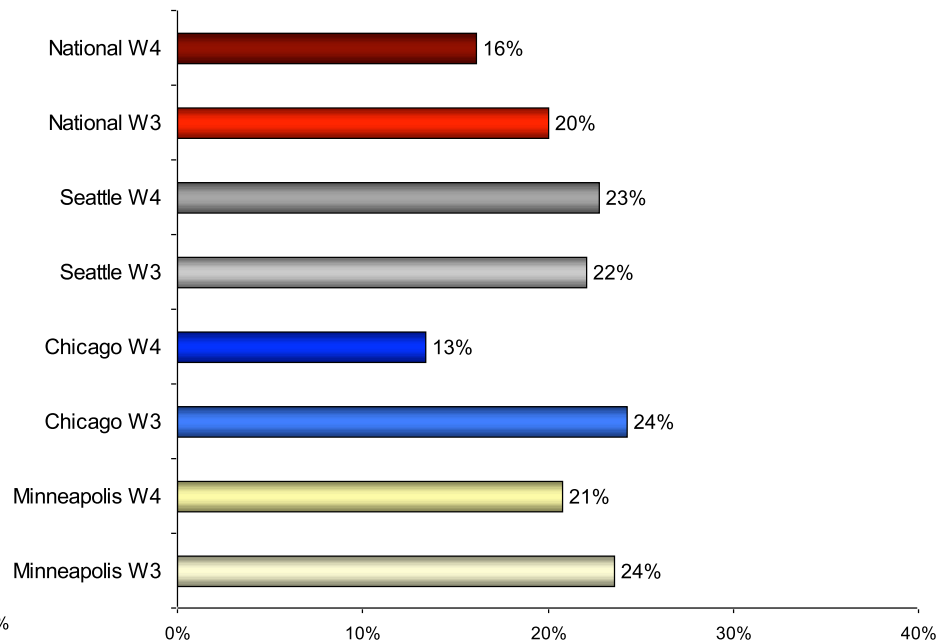
Q: What is the possibility that you will travel to the following destination in the next 18 months? (1-5 point scale)

- Geotravelers' likelihood to travel to Yellowstone and Glacier National Parks remains steady in Wave 4.
- There are no significant shifts compared to Wave 3.

**Likelihood to Travel to Yellowstone National Park
(4 or 5 Score)**



**Likelihood to Travel to Glacier National Park
(4 or 5 Score)**



Upper-case letters indicate the number is statistically higher than the value in the column referenced by the letter.

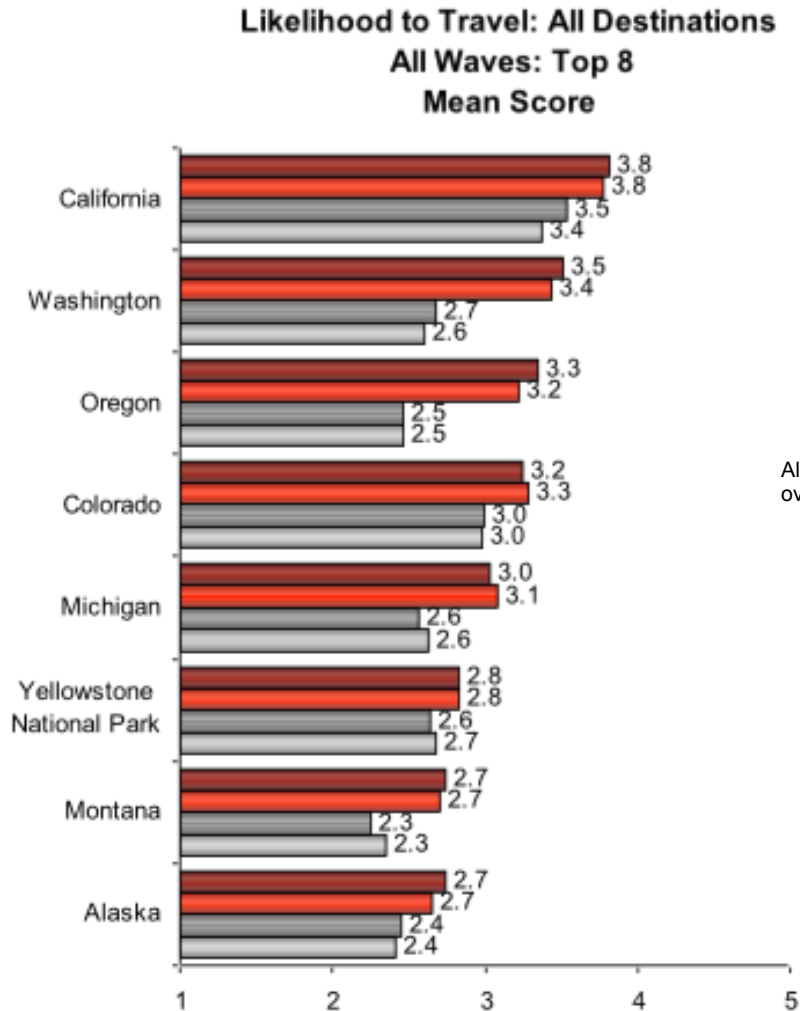
Base = 1,506 & 1,346 Geotravelers





All travel plans increase year over year

Q: What is the possibility that you will travel to the following destination in the next 18 months?



All Wave 3/Wave 4 results significant over Wave 1/Wave 2

- Geotraveler's travel plans shift little between Wave 1 and 2 or between Wave 3 and 4. However, their likelihood to travel to all destinations increases significantly year over year.
- Likelihood to travel to Montana and Yellowstone National Park increases significantly year over year.

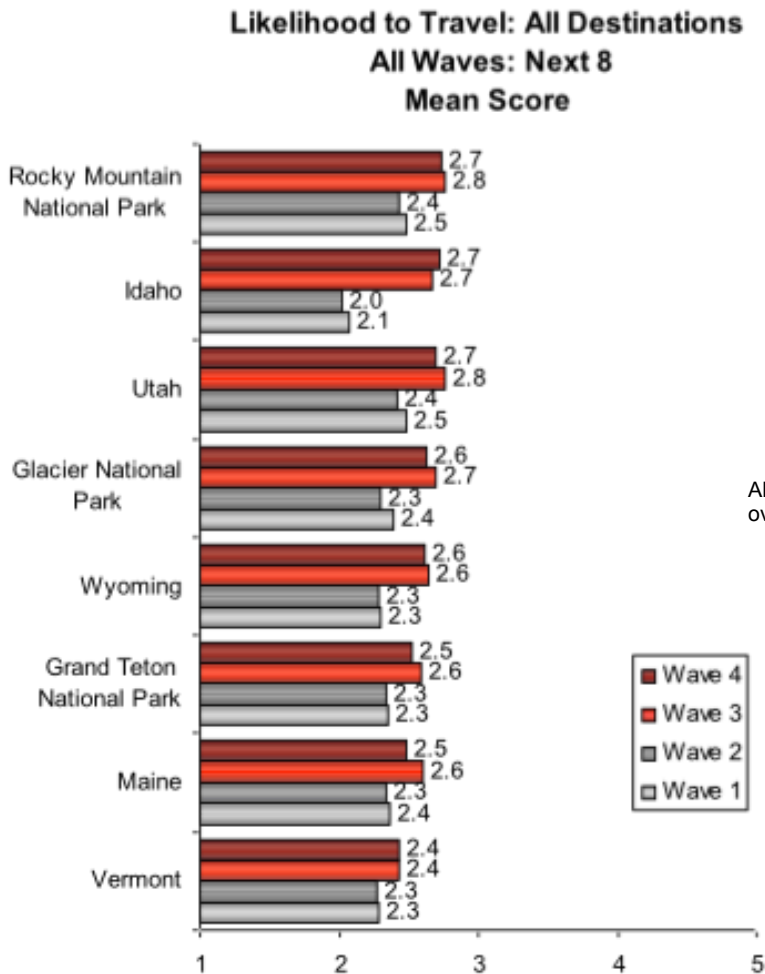
Base = 2,889 Geotravelers



All travel plans increase year over year

Q: What is the possibility that you will travel to the following destination in the next 18 months?

- Likelihood to travel to Glacier National Park also increases significantly year over year.



Base = 2,889 Geotravelers



Advertising increases as source of information for MT

Q: Do you recall how you heard about Montana as a travel destination? (Multiple responses allowed)

While friends and family remain the top source of information for Montana, four in ten (42%) Geotravelers cite advertising as a source in Wave 4, a significant increase over Wave 3.

All three media markets show increases in the number of Geotravelers mentioning advertising, with a significant shift in the Seattle market (45% vs. 32%).

Source for Montana as Travel Destination										
	Seattle W3 (A)	Seattle W4 (B)	Chicago W3 (C)	Chicago W4 (D)	Mnpls W3 (E)	Mnpls W4 (F)	National W3 (G)	National W4 (H)	TOTAL W3 (I)	TOTAL W4 (J)
Friends/Family	73%	70%	70% (D)	48%	66%	59%	69%	68%	69% (J)	61%
Magazine/Newspaper/Internet Article	35%	38%	36%	39%	37%	28%	44%	44%	37%	35%
Advertising	32%	45% (A)	37%	50%	34%	43%	27%	24%	33%	42% (I)
Visited before	10%	12%	7%	5%	12%	10%	11%	10%	10%	10%
Television program	19%	16%	16%	17%	16%	12%	16%	18%	17%	15%
Movie/books/research	1%	-	3%	-	1%	-	7%	3%	2%	0%
Social Networking Websites	2%	2%	3%	-	1%	1%	1%	2%	1%	1%
Internet	1%	-	1%	-	-	-	-	-	0%	-
Radio program	-	2%	2%	5%	3%	2%	-	2%	1%	3%

Base = 915 Geotravelers Familiar with Montana



Advertising does not increase as a source for all destinations

Q: How are you typically made aware of possible travel destinations? (Multiple responses allowed)

Advertising does not increase as a source of information in Wave 4 for all possible travel destinations.

Specific sources mentioned include:

- AAA
- NPS.gov
- RCI Timeshares

Made Aware of Travel Destinations										
	Seattle W3 (A)	Seattle W4 (B)	Chicago W3 (C)	Chicago W4 (D)	Mnpls W3 (E)	Mnpls W4 (F)	National W3 (G)	National W4 (H)	TOTAL W3 (I)	TOTAL W4 (J)
Friends/Family	85%	79%	82%	80%	77%	74%	86%	87%	82%	79%
Magazine/Newspaper/Internet Article	57%	68% (A)	59%	57%	60%	59%	69%	69%	61%	63%
Advertising	43%	46%	47%	49%	47%	46%	47%	43%	46%	46%
Visited before	4%	0%	1%	2%	1%	1%	1%	3%	2%	1%
Television program	49%	47%	43%	45%	39%	43%	50% (H)	37%	44%	44%
Movie/books/research	2%	2%	2%	4%	1%	3%	4%	5%	2%	3%
Social Networking Websites	7%	8%	5%	4%	4%	4%	11%	10%	6%	6%
Internet	58%	56%	59%	50%	55%	49%	53%	61%	57%	53%
Radio program	6%	7%	10%	8%	3%	5%	6%	5%	6%	6%

Upper-case letters indicate the number is statistically higher than the value in the column referenced by the letter.

Base = 1,584 Geotravelers

*Comments with lower than 3% incidence not shown.



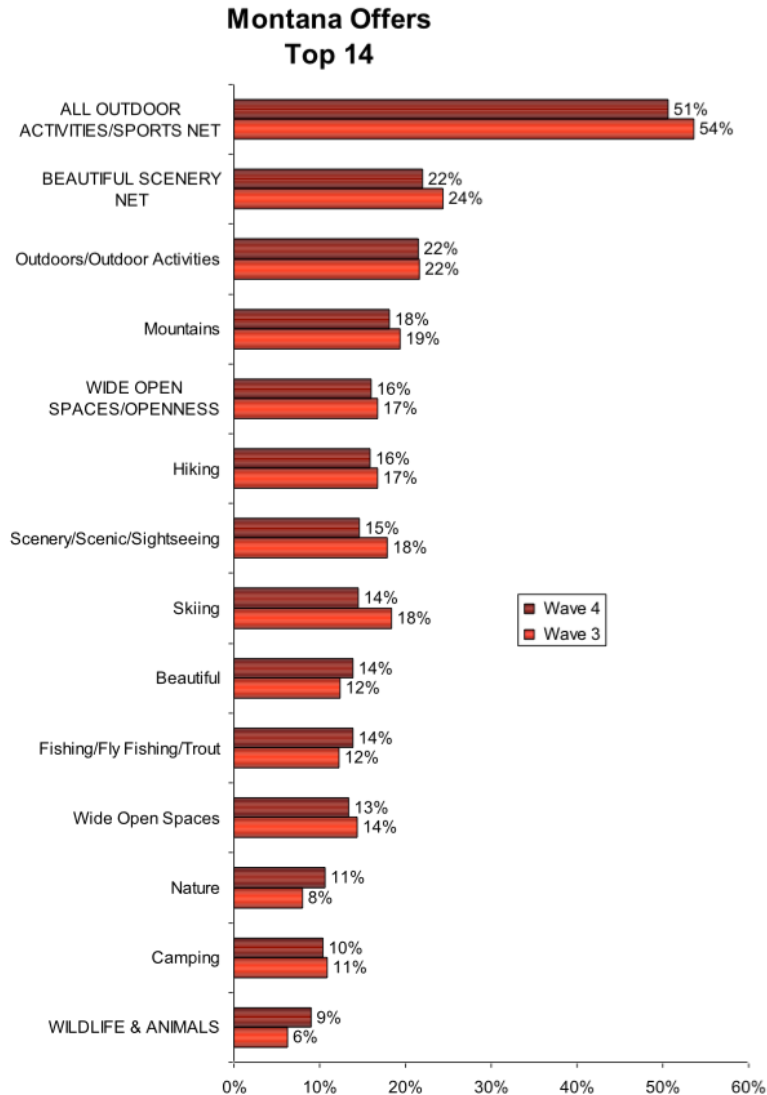


Brand & Competitive Associations



Montana offers outdoor activities and beautiful scenery

Q: In your own words, what does Montana offer to travelers?



In Wave 4, Montana continues to be viewed as a destination that offers outdoor activities, beautiful scenery, mountains and wide open spaces.

There are no notable, significant shifts between Wave 3 and Wave 4.

Geotraveler Comments:

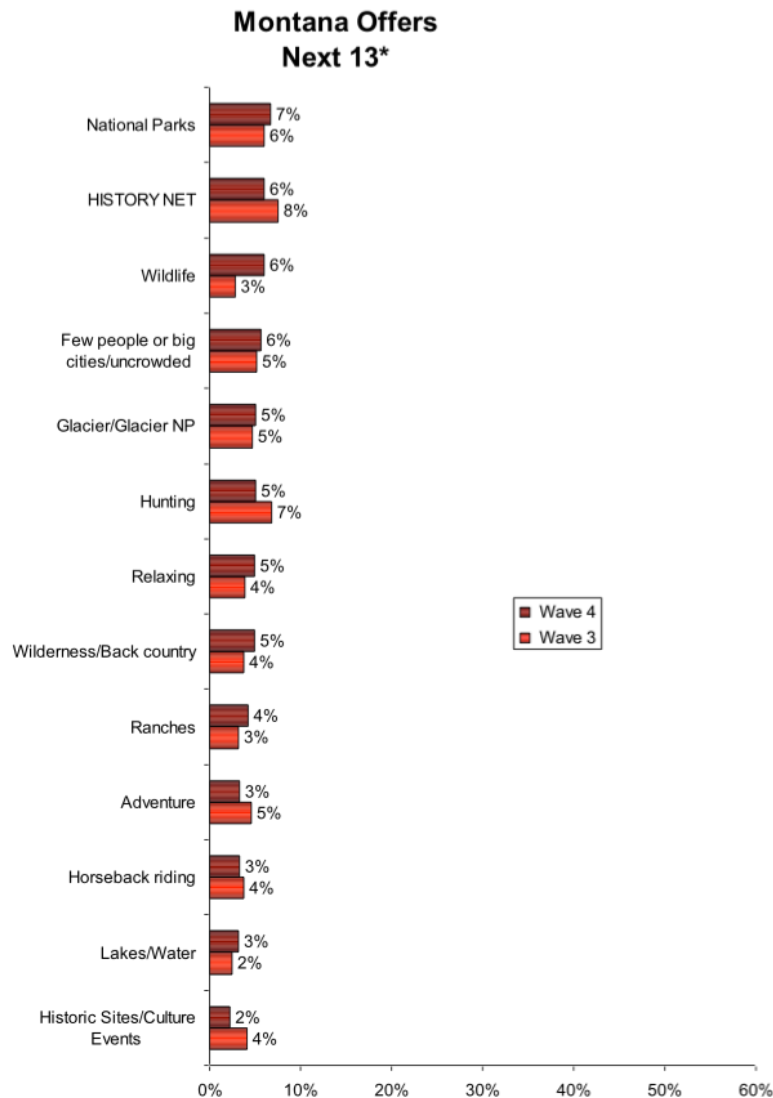
- *"Outdoor activities- hiking, skiing, fly fishing, paddling. Big Wide vistas."*
- *"Wide open spaces, beautiful mountains and open plains as far as the eye can see."*
- *"Montana is what you make it- it won't hold your hand. There are plenty of wilderness adventures available."*
- *"Fantastic backpacking, floating, history, and I'd like to someday do some fly fishing."*
- *"Glacier Nat Park, skiing, wide open spaces - hiking, camping, great views of wildlife."*

Base = 1,229 Geotravelers Aware of Montana



Montana offers National Parks and uncrowded relaxation

Q: In your own words, what does Montana offer to travelers?



In Wave 4, Montana continues to be viewed as a destination that offers national parks, and a relaxing location with few people or big cities.

Geotraveler Comments:

- *"A chance to get away from the hecticness of busy schedules and enjoy nature and the natural surroundings."*
- *"Quiet solitude, scenery."*
- *"Variety of scenery in a more private secluded setting."*
- *"The outdoors, peacefulness, getting next to nature."*

*Responses with lower than 3% incidence in W3 or W4 not shown.

Base = 1,229 Geotravelers Aware of Montana



Key attributes remain strongly associated with Montana

Q: Rate each of the following in terms of how much you associate it with Montana.

The key attributes focused on in the advertising continue to lead the list of associations Geotravelers have with Montana.

- There are no significant differences between Wave 3 and Wave 4 in the media markets.

Associate with Montana								
	Seattle W3 (A)	Seattle W4 (B)	Chicago W3 (C)	Chicago W4 (D)	Mnpls W3 (E)	Mnpls W4 (F)	National W3 (G)	National W4 (H)
Spectacular, unspoiled nature	4.5	4.4	4.5	4.5	4.4	4.4	4.5	4.5
Nice scenery	4.6	4.5	4.5	4.5	4.5	4.5	4.6	4.4
Western	4.0	4.0	4.1	4.2	4.1	4.2	4.1	4.3
Breathtaking experiences	4.0	4.0	4.0	4.1	4.1	4.0	4.1	4.2
Offers a sense of discovery	4.0	3.9	4.0	4.0	4.0	3.8	4.1	3.9
Fun and relaxing trip	3.9	3.9	3.7	4.0	3.8	3.8	4.0	3.9
Glacier National Park	4.1	4.0	3.4	3.3	3.8	3.8	3.7	3.6
Yellowstone National Park	3.5	3.4	2.8	3.1	3.4	3.3	3.0	3.2
I know what I'm going to get	3.1	3.1	3.0	2.9	3.1	3.1	2.9	2.9
Grand Teton National Park	2.6	2.4	2.5	2.4	2.5	2.4	2.3	2.3
Rocky Mountain National Park	2.3	2.2	2.2	2.2	2.3	2.3	2.0	2.0
Nothing to do there	1.8	1.8	1.9	1.9	1.7	1.8	1.5	1.6

Base = 1,238 Geotravelers Aware of Montana





National Parks increase in association year over year

Q: Rate each of the following in terms of how much you associate it with Montana.

The number of Geotravelers who associate both Glacier National Park and Yellowstone National Park with Montana significantly increases over 2009.

The number of Geotravelers who associate 'Offers a sense of discovery' with Montana decreases significantly from 2009.

Associate with Montana				
	Wave 1	Wave 2	Wave 3	Wave 4
	(A)	(B)	(C)	(D)
Spectacular, unspoiled nature	4.5	4.5	4.5	4.5
Nice scenery	4.6 BD	4.5	4.6	4.5
Western	4.1	4.1	4.1	4.2
Breathtaking experiences	4.1	4.0	4.0	4.1
Offers a sense of discovery	4.1 BD	3.9	4.0 D	3.9
Fun and relaxing trip	3.9 B	3.7	3.8 B	3.9 B
Glacier National Park	3.6	3.5	3.8 AB	3.7 AB
Yellowstone National Park	3.1	3.1	3.2	3.3 B
I know what I'm going to get	3.0 B	2.8	3.0 B	3.0 B
Grand Teton National Park	2.4	2.5	2.5	2.4
Rocky Mountain National Park	2.1	2.1	2.2	2.2

Base = 2,204 Geotravelers Aware of Montana



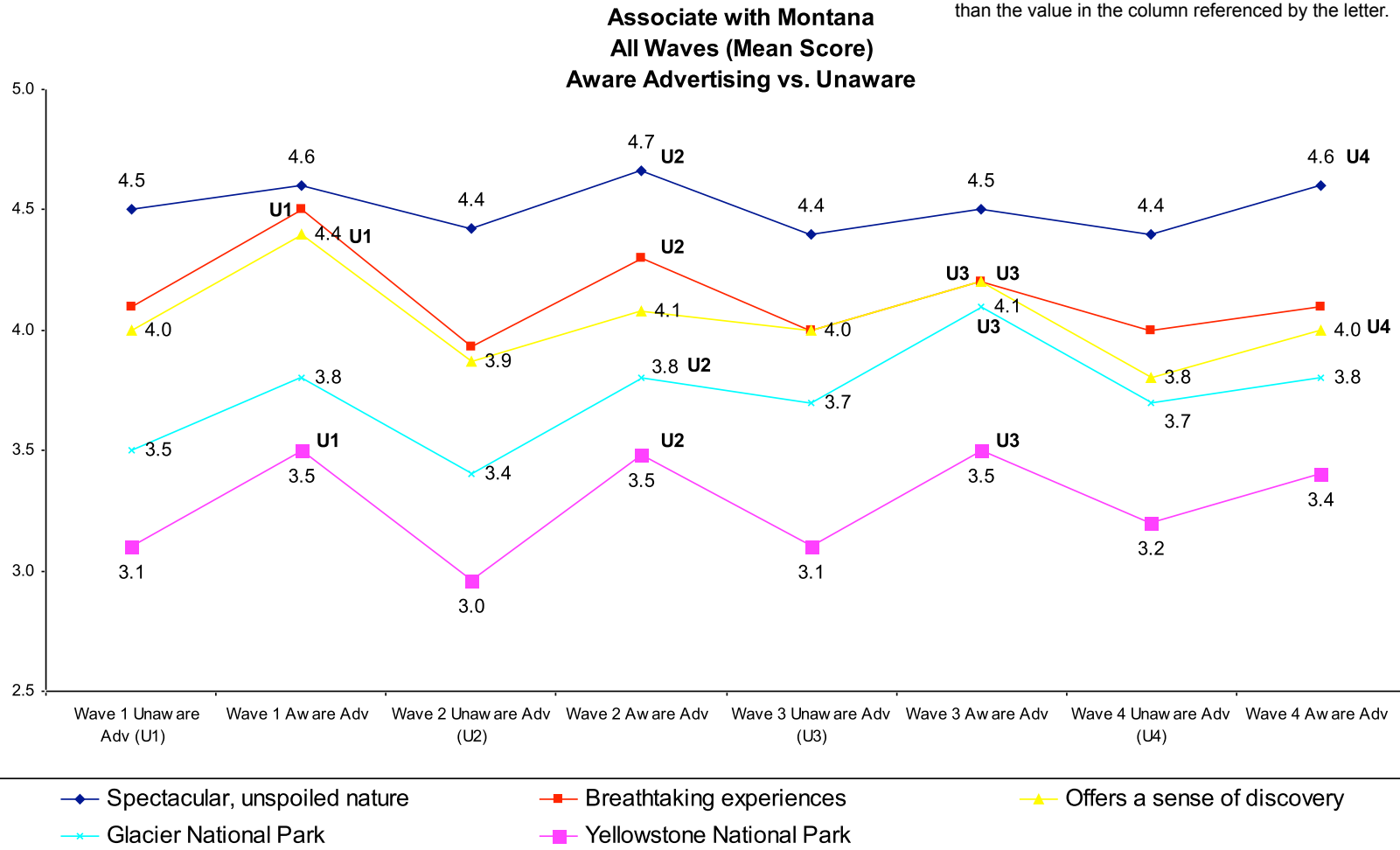


Advertising delivering on key attributes

Q: Rate each of the following in terms of how much you associate it with Montana.

Across all waves, Geotravelers who are aware of Montana's advertising are more likely to associate Montana with several key attributes including 'Spectacular, unspoiled nature' and 'Offers a sense of discovery' than those unaware of the advertising. They are also more likely to associate Montana with Yellowstone and Glacier National Parks.

Upper-case letters indicate the number is statistically higher than the value in the column referenced by the letter.

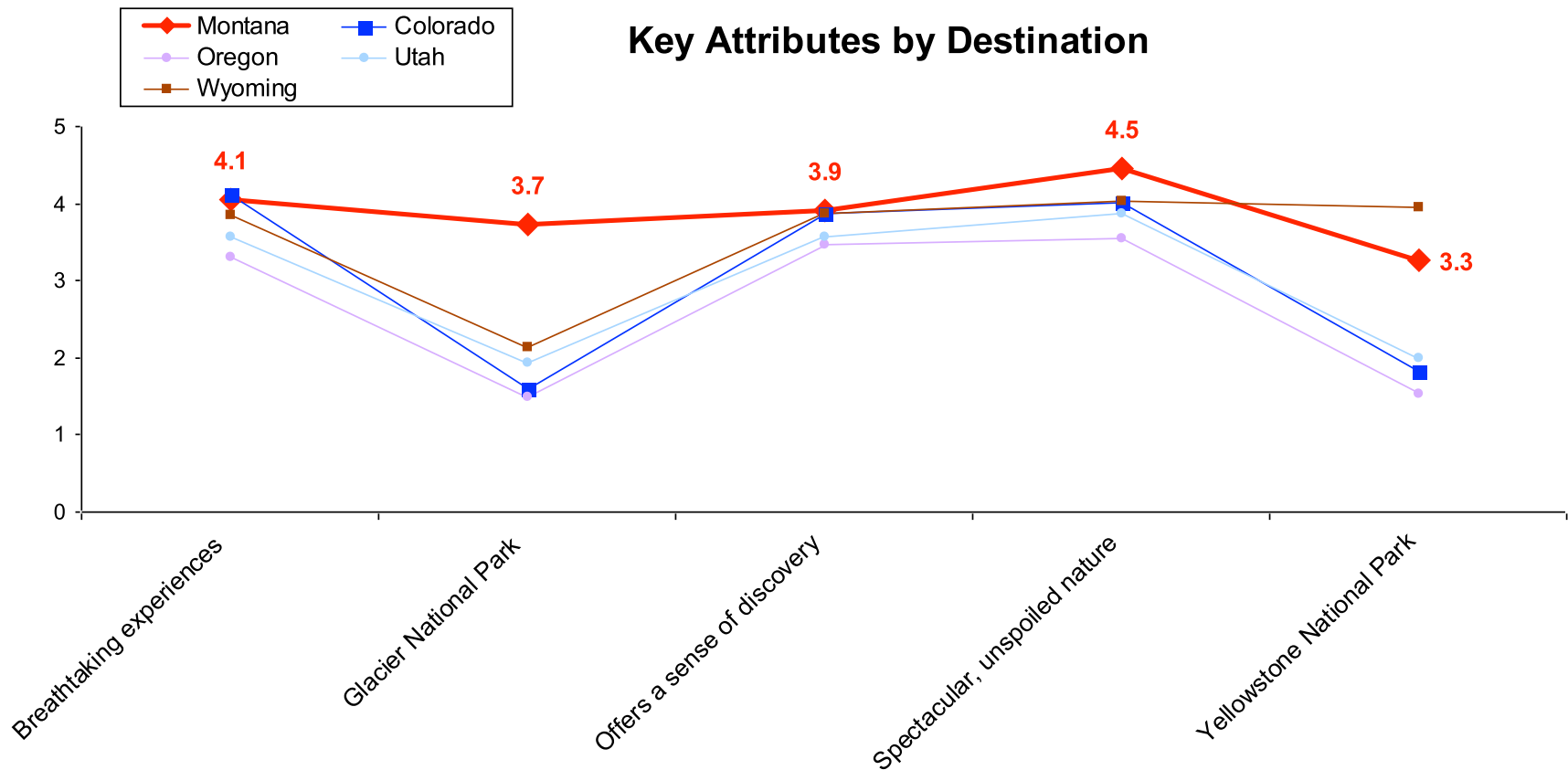




Montana maintains lead on key attributes

Q: Rate each of the following in terms of how much you associate it with Colorado/Oregon/Utah/Wyoming/Montana.

While Geotravelers continue to associate the three key attributes with the main competitive set of destinations, Montana maintains a slight lead.



Base = Varies based on awareness of each Destination

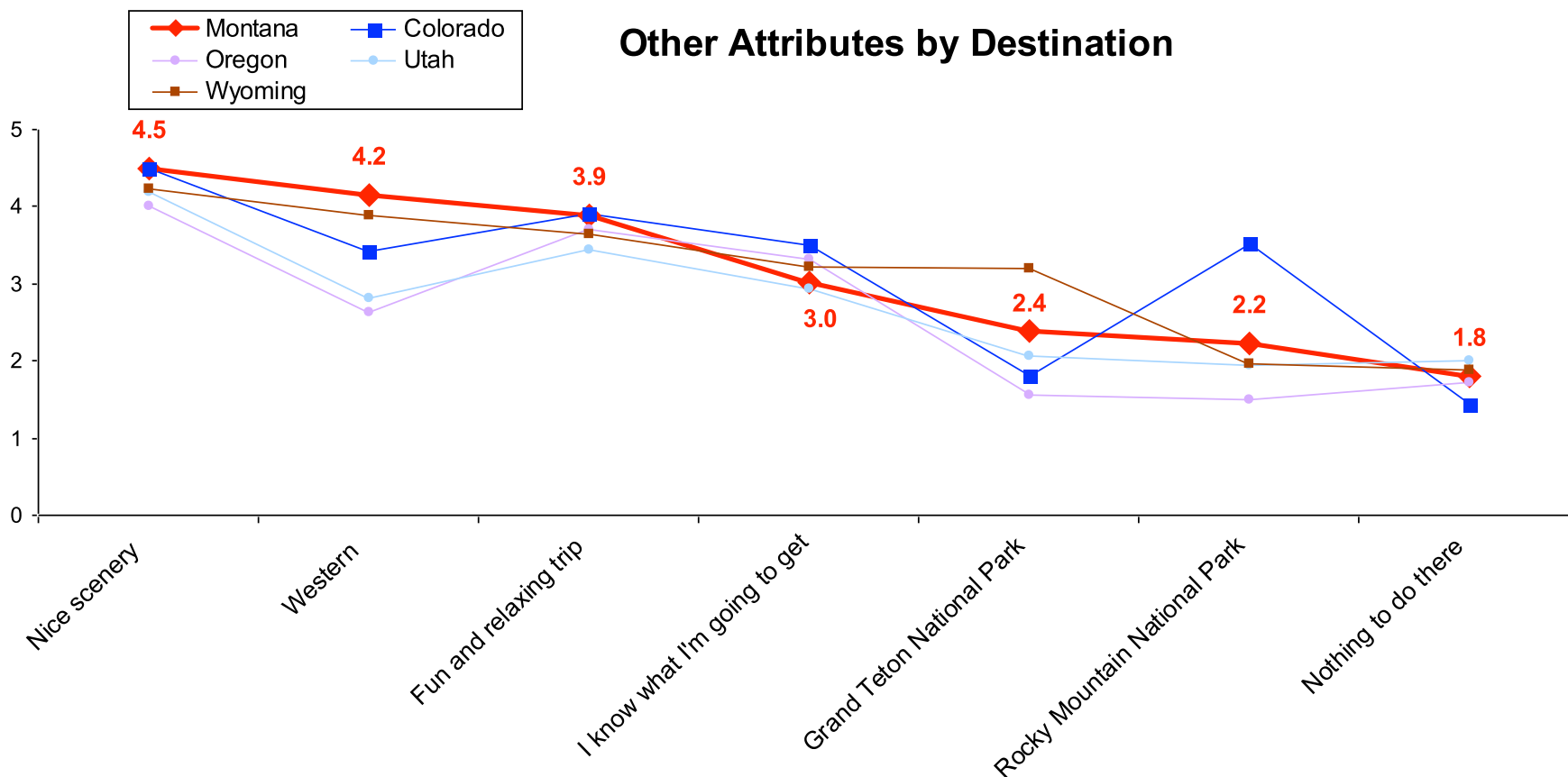


Destinations maintain similar associations

Q: Rate each of the following in terms of how much you associate it with Colorado/Oregon/Utah/Wyoming/Montana.

The remaining attributes show similar associations across destinations.

Other Attributes by Destination



Base = Varies based on awareness of each Destination





General Population Findings

In June, 2010 Leisure Trends Group added six core questions from the Awareness survey to the Quarter 2 LeisureTRAK* to measure the impact of the campaign on the general population.

These results are presented in the following section.

***LeisureTRAK**

Leisure Trends Group's LeisureTRAK® tracks behavior in over 240 leisure, travel, sports and recreational activities. This ongoing, quarterly study of Americans (4,000 annual interviews) began in 1989 and gives Leisure Trends Group deep insights into how Americans spend their leisure time.

Each quarter, 1,000 online interviews are conducted using scientific sampling and a random online methodology to reach a representative sample of the online American population, age 16 and over. The overall results are projectable to the United States online population, age 16 and over, with a margin of error of +/- 3.0% at a 95% confidence level.



Aided ad awareness of Montana at 6% for general population

Q: Thinking of the following travel destinations, please select all that you have seen or heard advertising for in the past three months or so.

Sixteen percent of the general population (not Geotravelers) are aware of advertising for Yellowstone National Park and 6% are aware of Montana's advertising. All three media markets show a significant increase in awareness over the control group (the national population).

Aided Advertising Awareness				
General Population	GPOP National* (A)	GPOP Seattle (B)	GPOP Chicago (C)	GPOP Mnpls (D)
California	33%	47% (A)	36%	30%
Alaska	22%	37% (A)	34% (A)	27%
Michigan	16%	10%	49% (A)	18%
Yellowstone National Park	16%	20%	17%	24% (a)
Utah	10%	16%	12%	11%
Washington	9%	35% (A)	7%	7%
Rocky Mountain National Park	8%	8%	8%	3%
Maine	7%	4%	4%	-
Montana	6%	18% (A)	13% (a)	20% (A)
Wyoming	6%	11%	17% (A)	29% (A)
Vermont	6%	3%	1%	3%
Oregon	5%	30% (A)	5%	5%
Idaho	5%	14% (A)	10%	6%
Glacier National Park	4%	9%	8%	12% (A)
Colorado	4%	9%	8%	12% (A)
Grand Teton National Park	3%	5%	2%	5%
None of these	46%	34%	31%	35%

*General Population National is a random sampling of Americans balanced by age, gender and region. It provides the control group to contrast with the extra sample of respondents from each media market.

Upper-case letters indicate the number is statistically higher than the value in the column referenced by the letter at the 95% confidence. A lower-case letter indicates 90% confidence. Differences shown over National sample only.



Nineteen percent of general population have visited Montana

Q: As an adult, have you ever traveled to any of the following destinations?

Nineteen percent of the general population have visited Montana and one quarter have visited Yellowstone National Park. One in ten have visited Glacier National Park. Americans living in Seattle and Minneapolis are significantly more likely to have visited Montana and both National Parks.

Destinations Ever Traveled				
General Population	GPOP National* (A)	GPOP Seattle (B)	GPOP Chicago (C)	GPOP Mnpls (D)
California	70%	86% (A)	64%	83% (A)
Colorado	42%	45%	49%	65% (A)
Washington	38%	96% (A)	29%	53% (A)
Michigan	37%	22%	87% (A)	64% (A)
Utah	30%	46% (A)	21%	46% (A)
Oregon	26%	90% (A)	17%	46% (A)
Yellowstone National Park	25%	39% (A)	22%	58% (A)
Idaho	23%	62% (A)	16%	40% (A)
Wyoming	22%	38% (A)	24%	59% (A)
Maine	22%	13%	12%	21%
Vermont	20%	13%	12%	19%
Montana	19%	50% (A)	16%	60% (A)
Rocky Mountain National Park	18%	22%	15%	28%
Grand Teton National Park	13%	23% (A)	13%	33% (A)
Alaska	12%	33% (A)	12%	18%
Glacier National Park	10%	24% (A)	7%	44% (A)

Base = 735 General U. S. Population, 104 Seattle, 86 Chicago and 80 Minneapolis



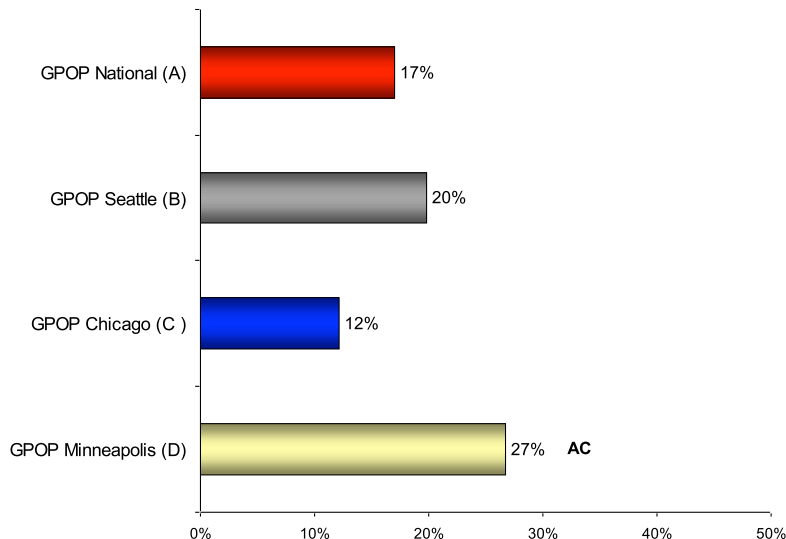
Those aware of advertising more likely to travel to MT

Q: What is the possibility that you will travel to the following destination in the next 18 months? (1-5 point scale)

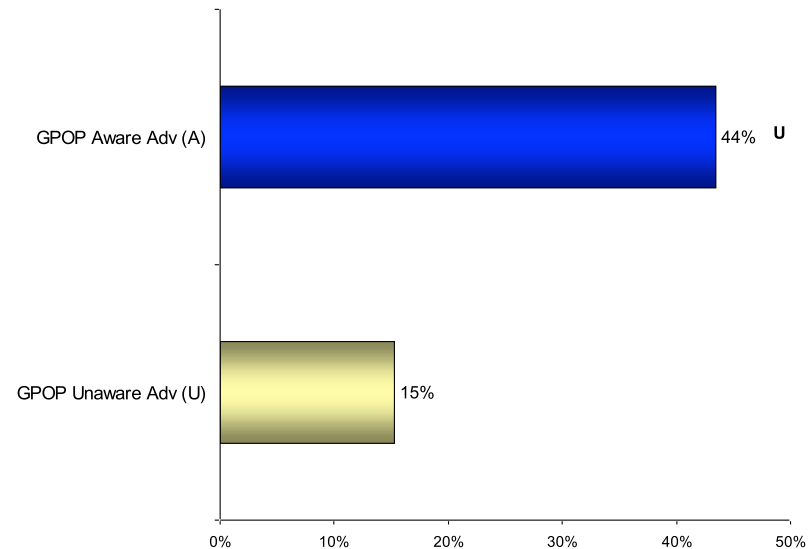
While 17% of the general population is likely to travel to Montana in the next 18 months, two in ten (20%) from Seattle and 27% from Minneapolis say they are likely to visit.

Those in the general population who are aware of Montana's advertising are significantly more likely to plan to travel to Montana*.

**Likelihood to Travel to Montana
General Population
(4 or 5 Score)**



**Likelihood to Travel to Montana
General Population (4 or 5 Score)
Aware Advertising vs. Unaware**



Base = 963 General U. S. Population, 101 Seattle, 99 Chicago and 101 Minneapolis

*While significant, results directional due to small base size.

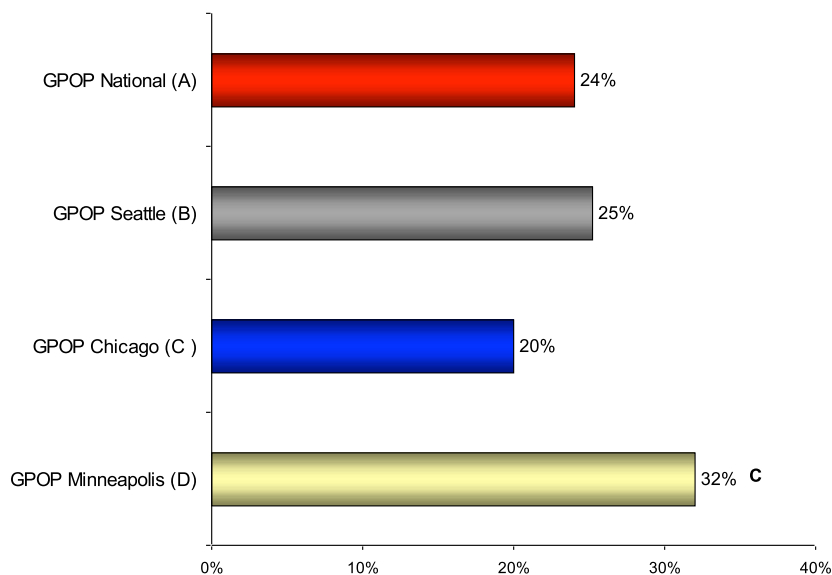


Roughly two in ten in general population plan to visit NP's

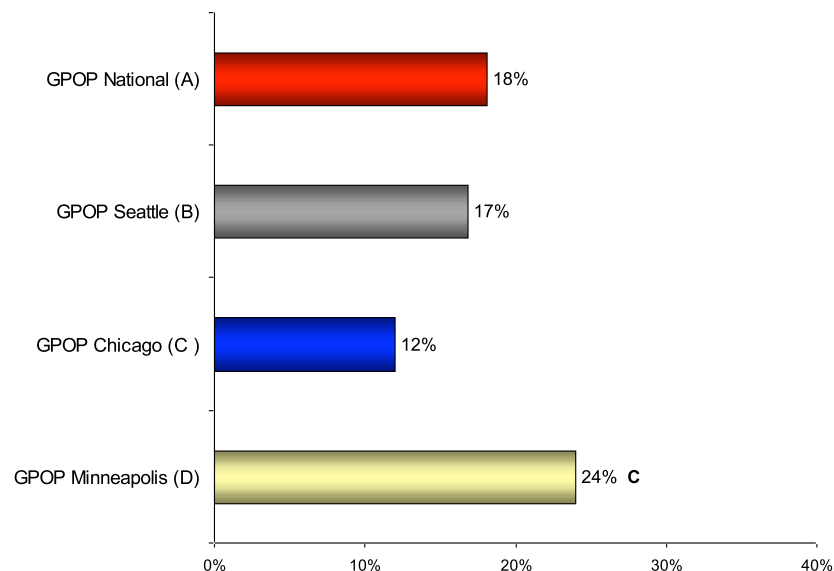
Q: What is the possibility that you will travel to the following destination in the next 18 months? (1-5 point scale)

Almost a quarter of the general population (24%) plan to visit Yellowstone National Park and 18% plan to visit Glacier National Park in the next 18 months.

**Likelihood to Travel to Yellowstone National Park
General Population
(4 or 5 Score)**



**Likelihood to Travel to Glacier National Park
General Population
(4 or 5 Score)**

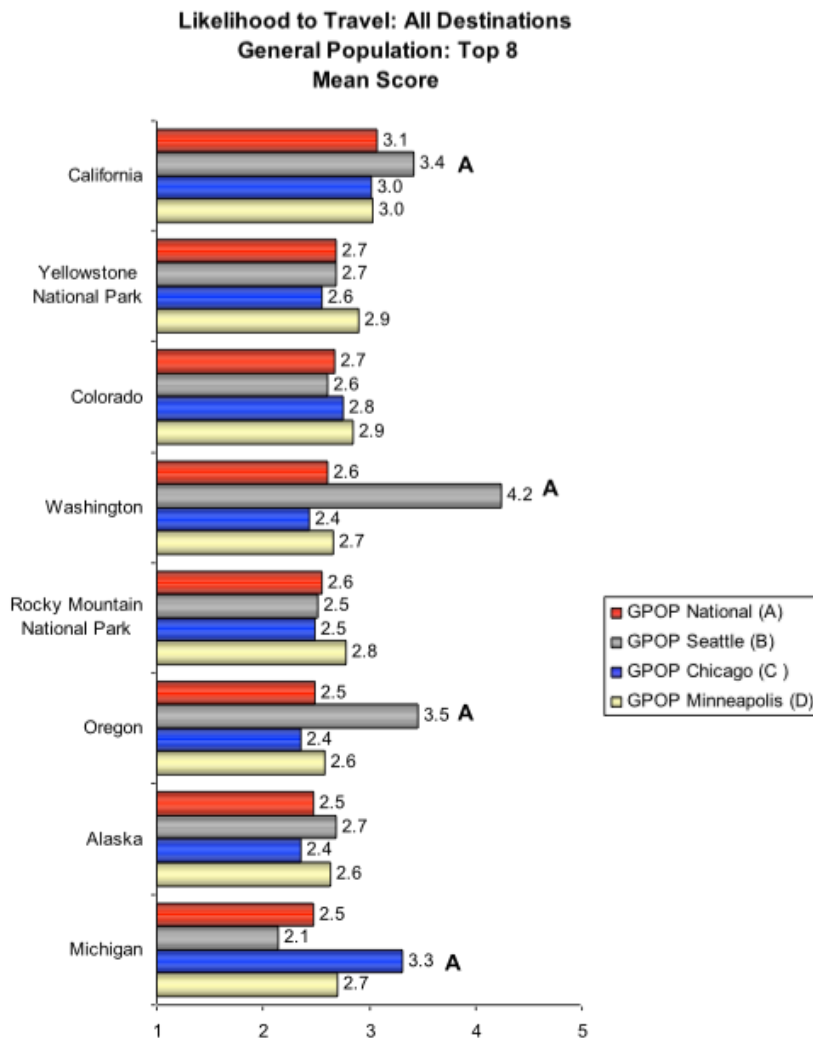


Base = 963 General U. S. Population, 101 Seattle, 99 Chicago and 101 Minneapolis



California and Yellowstone lead in likelihood to travel

Q: What is the possibility that you will travel to the following destination in the next 18 months? (1-5 point scale)



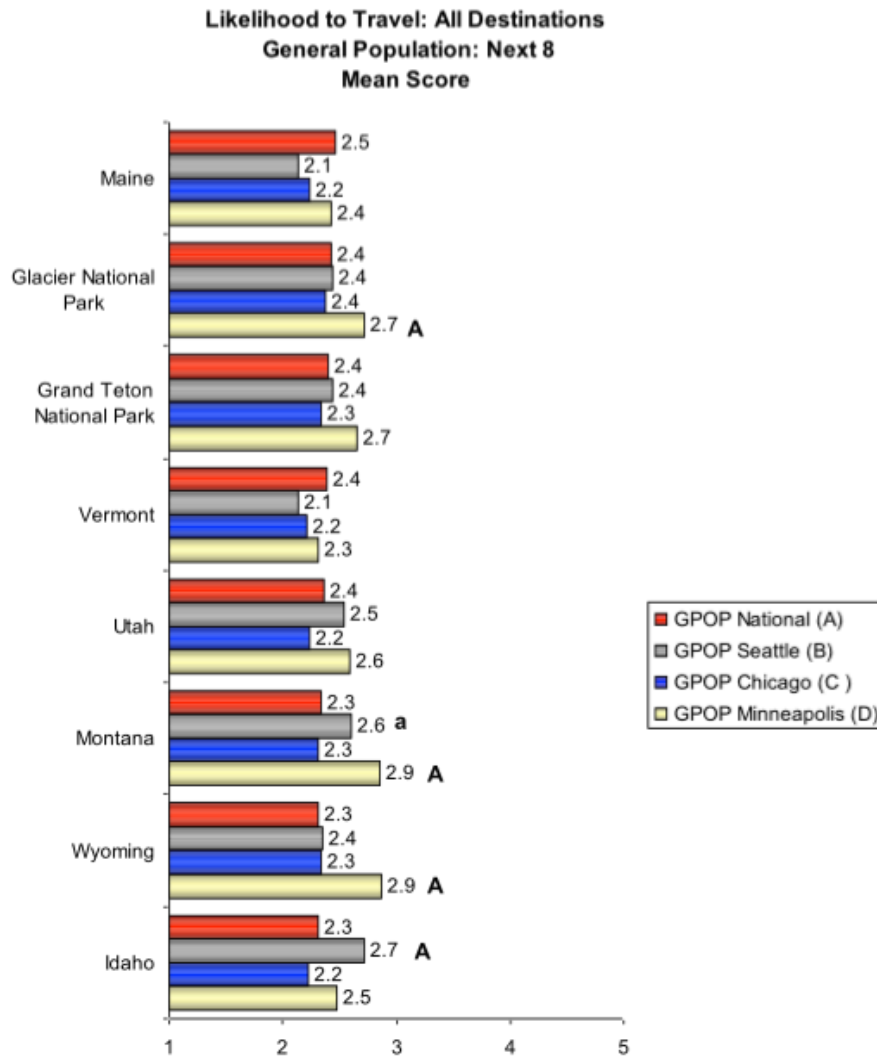
Montana does not rank in the top 8 destinations the general population is planning to travel to in the next 18 months except for Yellowstone National Park which ranks second.

Upper-case letters indicate the number is statistically higher than the value in the column referenced by the letter at the 95% confidence. A lower-case letter indicates 90% confidence. Differences shown over National sample only.



Montana ranks below most destinations

Q: What is the possibility that you will travel to the following destination in the next 18 months? (1-5 point scale)



Those from Seattle and Minneapolis are significantly more likely to be planning to travel to Montana and those from Minneapolis are more likely to be planning to travel to Glacier National Park in the next 18 months than the national sample.

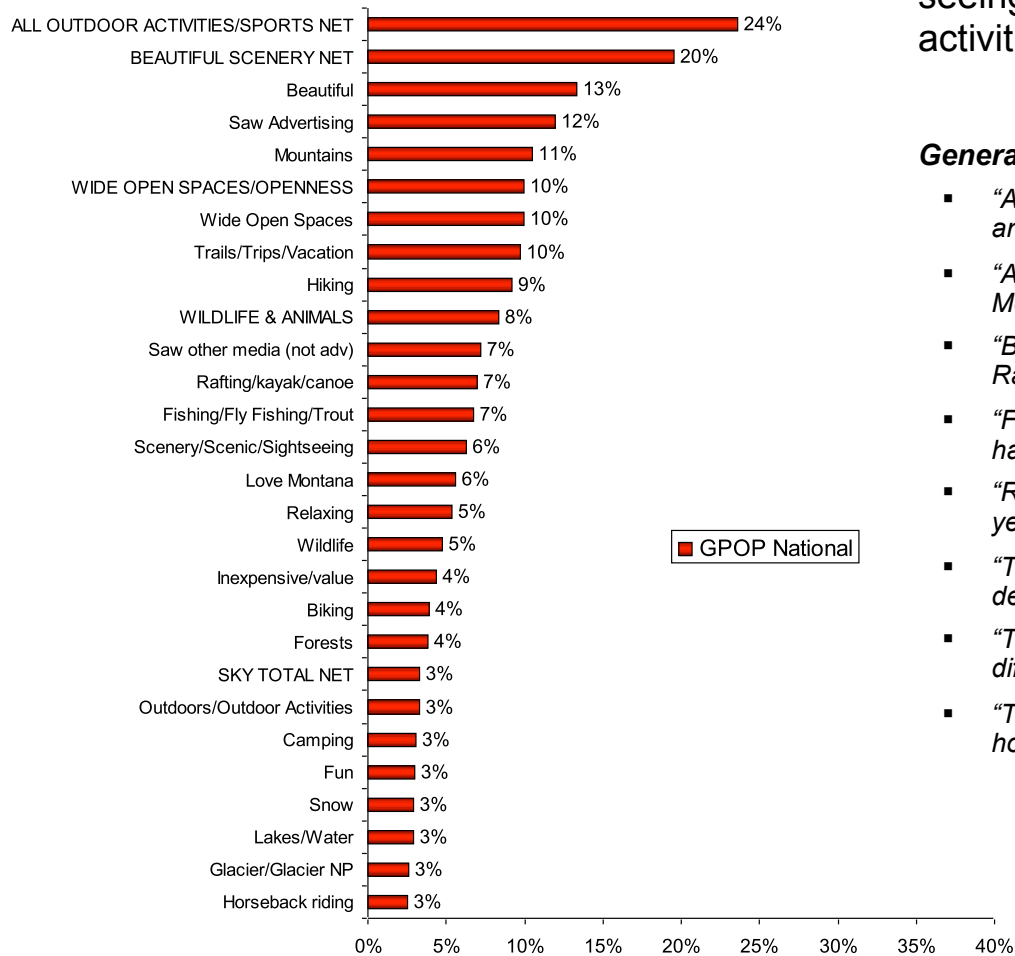
Upper-case letters indicate the number is statistically higher than the value in the column referenced by the letter at the 95% confidence. A lower-case letter indicates 90% confidence. Differences shown over National sample only.



Outdoor activities and scenery recalled in advertising

Q: Please describe what you saw or heard in the Montana advertising to the best of your ability.

Recall From Advertising General Population



Those in the general population who recall seeing Montana's advertising mention outdoor activities and beautiful scenery.

General Population Comments:

- "A combination of snowy mountains; unique small towns; ample wilderness areas; excellent hiking and camping."
- "A magazine spread showing the wide open spaces in Montana, and describing it as a great getaway."
- "Big Sky Country, Beautiful Lakes and Rivers, Fishing, Ranches, Horses, Missoula, Grizzlies."
- "Fishing open spaces a great place to relax and rest and have abundance of fun."
- "Relaxing, seeing the country, seeing glacier national park, yellow stone park, the continental divide."
- "The commercial seemed to advertise adventure destinations, such as hiking and canoeing."
- "TV ad, Get Lost in Montana.com. They showed pictures of different places in Montana."
- "The wide opened spaces that a person could camp or ride horses. To be just free."



Key attributes rate high with general population

Q: Rate each of the following in terms of how much you associate it with Montana

The key attributes focused on in the advertising lead the list of associations the general population has with Montana. Those from Seattle and Minneapolis are significantly more likely to associate many of the key attributes with Montana than those in the national sample.

Associate with Montana				
General Population	GPOP National* (A)	GPOP Seattle (B)	GPOP Chicago (C)	GPOP Mnpls (D)
Nice scenery	3.8	4.0	3.9	4.2(A)
Spectacular, unspoiled nature	3.7	4.0 (A)	3.7	4.1 (A)
Breathtaking experiences	3.5	3.6	3.4	3.8 (A)
Western	3.5	3.7	3.5	3.7 (A)
Offers a sense of discovery	3.4	3.5	3.6	3.7 (A)
Fun and relaxing trip	3.4	3.6	3.4	3.9 (A)
Yellowstone National Park	2.9	3.3 (A)	3.2 (A)	3.4 (A)
Glacier National Park	2.9	3.4 (A)	3.1 (a)	3.6 (A)
Rocky Mountain National Park	2.8	2.8	2.8	2.9
Grand Teton National Park	2.7	2.9	2.8	3.1 (A)
I know what I'm going to get	2.7	3.2 (A)	2.7	3.2 (A)
Nothing to do there	2.3	2.4	2.3	2.0

Upper-case letters indicate the number is statistically higher than the value in the column referenced by the letter at the 95% confidence. A lower-case letter indicates 90% confidence. Differences shown over National sample only.

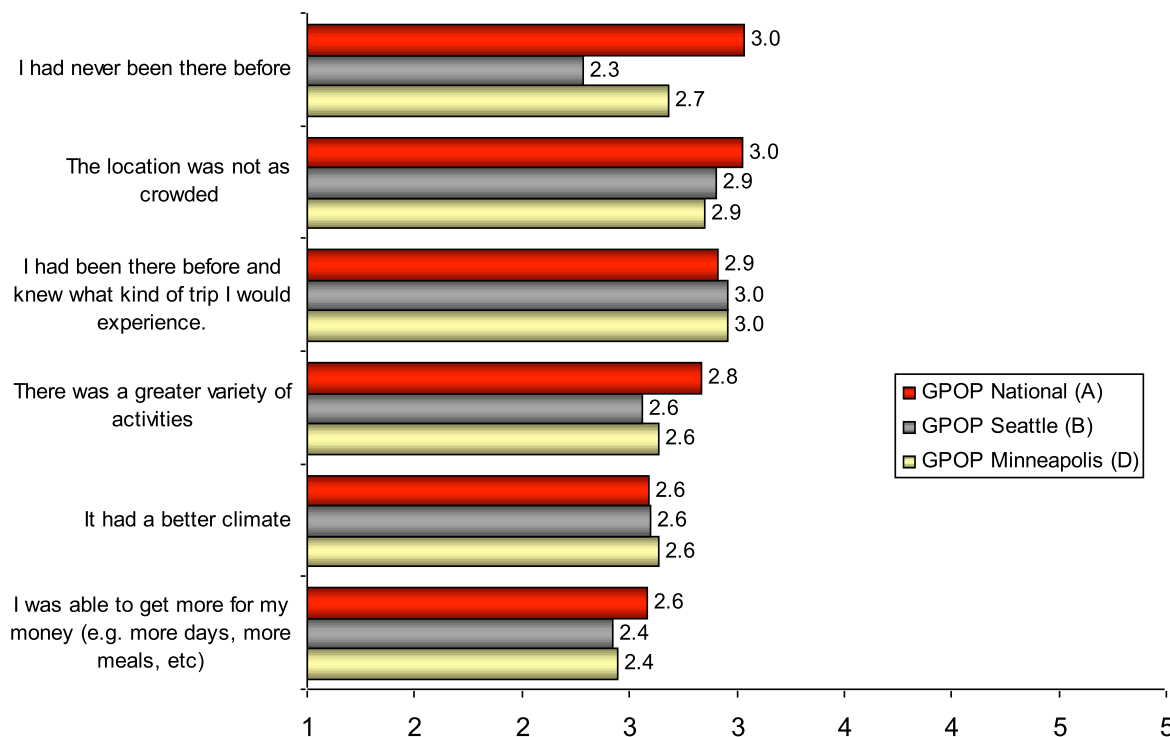
Base = 969 General U. S. Population, 104 Seattle, 101 Chicago and 101 Minneapolis



'Never been before' top draw for general population

Q: Thinking about your last trip to Montana what made you choose Montana over another destination you were considering? Please rank the following factors in choosing on a scale of 1-5 where 1 is not at all influential and 5 is very influential.

Montana Travel Considerations
General Population: Top 6
Mean Score



Never having been to Montana before and the uncrowded nature of the destination are the top reasons cited by the general population for choosing Montana on their last trip.

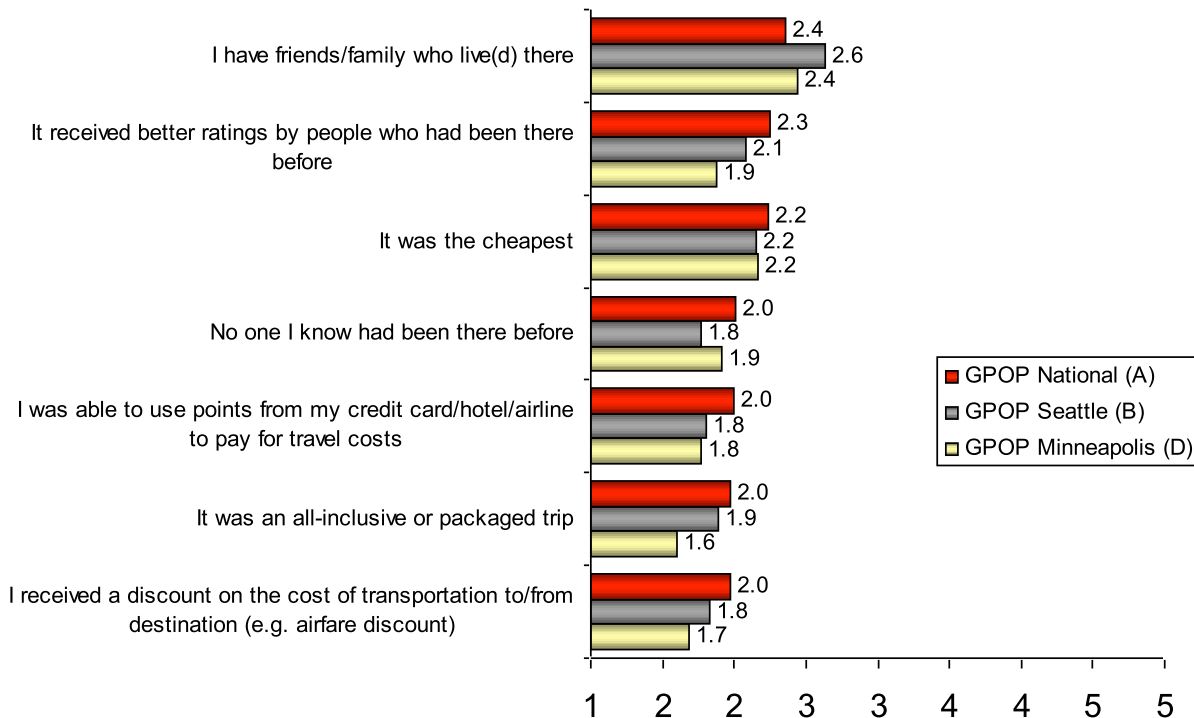
Base = 137 General U. S. Population, 52 Seattle and 48 Minneapolis have traveled to Montana. (Chicago too small to report)



Package rates and discounts rank lowest

Q: Thinking about your last trip to Montana what made you choose Montana over another destination you were considering? Please rank the following factors in choosing on a scale of 1-5 where 1 is not at all influential and 5 is very influential.

Montana Travel Considerations General Population: Next 7 Mean Score



All-inclusive trips and transportation discounts rank the lowest as reasons the general population selected Montana.



Next Steps



Next Steps

Leisure Trends Group will conduct a follow up study to all Geotravelers and General Population sample who indicated they were likely to travel to Montana in the next 18 months. This Conversion study will be fielded in the fall of 2010 and will measure how many did actually travel to Montana and collect information about their visit.



Appendix



Geotravelers

Place a premium on nature, wildlife, being comfortable, great experiences and a sense of exhilaration.
Active in outdoors with both rigorous and/or leisurely activity.

Target Demo:

Adults 25-64
College Graduates
+\$50K HHI

Target Behaviors

Domestic travelers who participate in one or more while on vacation:

Sightseeing
Visiting national parks
Backpacking/hiking
Skiing
Other outdoor sports or recreation
Fishing
Bicycle riding

While target definition changed slightly in 2010, the same screening questions and exclusion tactics were used to ensure accurate trending to 2009 results.